UOFL SHAREPOINT ADMINISTRATORS GUIDE

Learn how to administer a SharePoint site.

WOW What Power!

SharePoint Administrator Training

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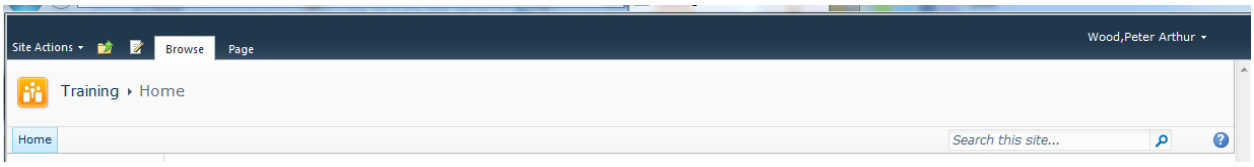
Basics

Definitions:

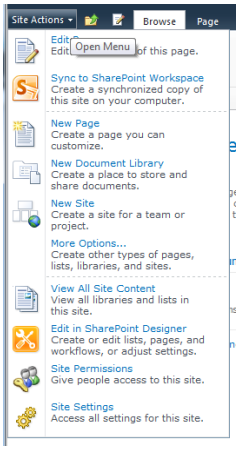
- Site Collection – This is your base site. Everything you do in your SharePoint site happens under the site collection.
- Site – A site inside your site collection that can have its own document collections and permissions.
- Library – A collection of items in a site.
- List – A list of items that are associated with each other.

The Ribbon:

Microsoft introduced the Ribbon in SharePoint 2010. The ribbon appears at the top of the page. The ribbon changes to suit the user's current location on the site collection. On the home page it looks like this (the browse tab is selected by default).

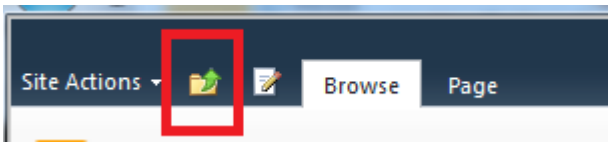


Features of the ribbon:



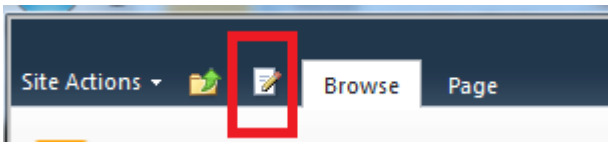
Site Actions – The site actions menu lists all of the available site wide options available to each user. As site collection administrator you will have access to all controls having to do with the site collection. Some of the options this class will cover are: Site Permissions, Site Settings, View all Site Content, New Page, New Site, and New Document Library.

Navigation Button:



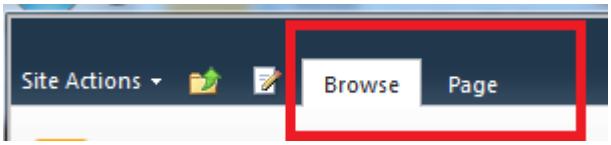
The Navigation Button allows the user to move up the site tree. The navigation button can be useful if the site "bread crumbs" links on the browse tab are not visible. This can happen if another ribbon tab is expanded.

Edit Page Button:



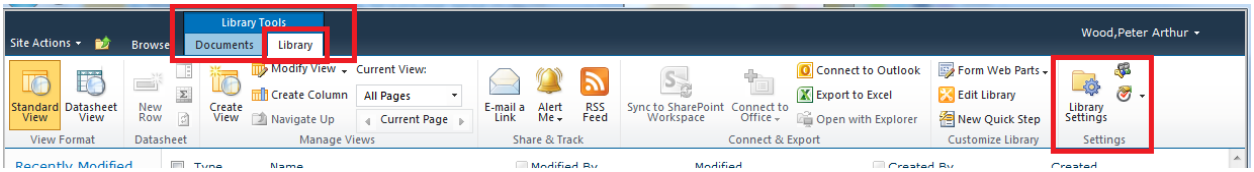
The edit page button is used for editing the current page. This control is only available if the user navigates to an editable page like the home page or web part page.

Tabs:



All pages on a SharePoint site have at least one tab. Normally the browse tab is the default as it is handy for navigating around the site and has the search tools on it.

Library/List Tools:



When you are in a library, the ribbon will add the Library Tools section to the tabs. The library tools allow the user to manipulate the library view.

Of importance to the site administrator is the Settings and Customize Library sections. In the Settings section are three controls that allow you to adjust the settings of the library. The Library settings button allows you to modify and manage the library. The Library Permissions button allows you to change the permissions at the library level (see below). The Workflow Settings button allows you to set up and control workflows.

The customize library section has controls to Modify the web parts in the forms associated with this document library. Edit library allows you to make modifications to the library in SharePoint Designer. New quick step allows you to define a new ribbon button that will activate a workflow.

Library Settings Screen:

The library settings screen allows the administrator to modify most of the settings associated with the library. This course will cover some of the more common settings you will need.

Under General settings you have the following options:

- Title, description and navigation – This allows you to change the title of the library page, the description of the page displayed in listings, and whether the library will be displayed in the quick launch.
- Versioning settings – This page allows you to manage document versions and checkout requirements.

- Advanced settings – This allows you to turn on and off some advanced features on the library such as datasheet view and allow search.
- Validation settings - you can enter a formula for validating information entered into a column on the library.
- Change default column values – If a column can have a default value this is where you can set it.
- Rating settings – Allow ratings on library items.
- Modify list audience targeting settings – A check box to allow audience targeting.
- Metadata Navigation Settings – Set field types to further organize the current list in the left navigation window. Also set up filters for this list.
- Per Location View Settings – Set view inheritance and available views.
- Form Settings – Customize forms for the library.

Under Permissions Management are the following:

- Delete This Library – This will delete the library and all of its contents.
- Permissions for this Library – This is where you set permissions for the contents of the library.
- Manage files which have no checked in version – This tool allows you to take ownership of a checked out file to check it in properly.
- Workflow Settings – Control when and how workflows are initiated and add new workflows to the library.
- Generate file plan report – generates a report about the library and its contents.
- Enterprise Metadata and Keywords Settings – Activate keyword and metadata functionality to the library.
- Information management policy settings – Define retention policies for the contents of the library.

Communications:

- RSS settings – Allows you to set up RSS for the library.

Setting up permissions:

The recommended method of managing permissions is to create groups and give the groups permission to an area or item. This allows easy management of user permissions by giving the admin one location to add or remove permissions for multiple areas. For instance, if permissions are given to individuals and a user with permissions to 5 items leaves and is no longer allowed to view those items, the administrator must go to each individual area and remove that user. If that user is in a group with access to those areas then they need only be removed from the group.

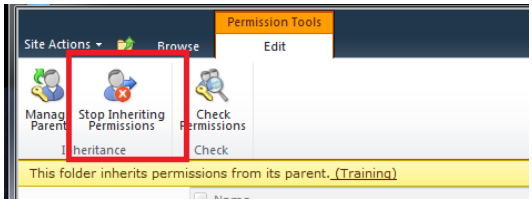
There are several levels of security on SharePoint 2010

- Site Collection Wide Permissions
- Site Wide Permissions
- Library/list Permissions
- Document Permissions

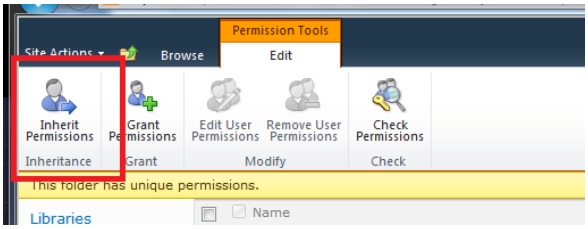
Inheritance

Inheritance allows all items contained in the item you are setting permissions on to have the same permissions. This allows you to give permissions to a folder and all documents or folders in that folder. To stop this behavior you can "break" inheritance. If, for instance, you need to restrict access to a folder in a document library, you can break inheritance on the sub folder and set the permissions differently from the document library. All items contained in that folder will now inherit the permissions of the folder but not the document library.

To break inheritance, go to the permissions for the object you want to change. Click the "Stop Inheriting Permissions" ribbon button.



The ribbon will change and allow you to grant permissions as below. To turn on inheritance again, click the "Inherit Permissions" ribbon button. This will remove any special permissions you set up while inheritance was broken.



Site Collection Wide Permissions

Permission at the site collection level should be set to the minimum level needed for access to ALL information on the site collection. Most permissions at this level should probably be set to “Limited access”. The default groups available are “Owners”, “Members”, and “Viewers”.

Site Wide Permissions

Permissions at the site level are similar to permissions at the site collection level. In fact they are the same for the home site. The same permissions guideline as above should apply here too.

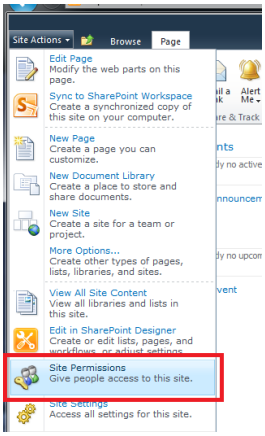
Library/List Permissions

At the Library level, permissions should be more liberal. If a group is to have permission to see an entire library the permissions for the group would be set at the library level.

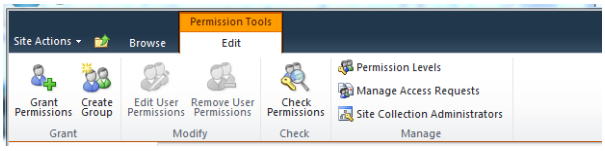
Document Permissions

Each document can also have permissions of its own.

Site collection permissions can be accessed through the Site Actions Menu

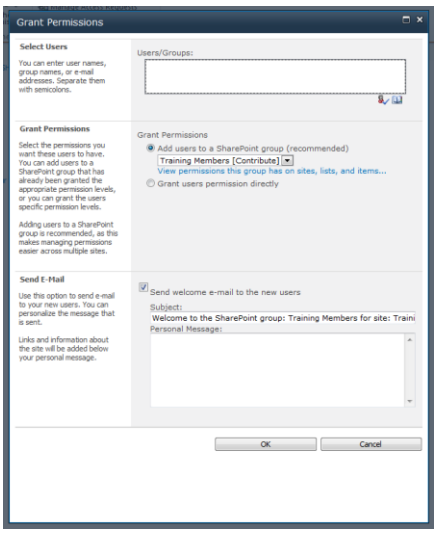


The ribbon for the site permissions page allows you to do the following:



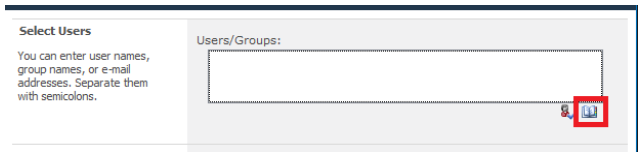
- Grant Permissions
- Create Groups
- Edit User Permissions
- Remove User Permissions
- Check a user's permissions
- Add or modify permission levels
- Manage access requests
- Manage site collection administrators

Grant Permissions:



The Grant Permissions dialog has 3 sections.

1. Select Users – if you know the AD user id of the person you want to grant permissions, enter it in the box. If you are adding multiple user ids separate them with a semi-colon. If you do not know the user id of the user you want to add, click on the Browse icon



   a. Type the user's name in the find box last name comma first name(no spaces) press enter
   b. Select the correct user from the list presented
   c. Click the add button.
   d. Click OK.

   When all user ids are properly entered click the Check Names button

   If all users are entered correctly, the full name of the user will appear in the box and be underlined. Any names not underlined are incorrect.
2. Grant Permissions – The grant permissions section allows you to select a group in which to add the users. If you are unsure what permissions the currently selected group has, click the link entitled "View permissions this group has on sites, lists, and items...". You can also define permissions for users directly but this is not recommended in most circumstances as it makes it harder to manage the permissions.
3. Send E-Mail – the default action for the Grant Permissions dialog is to send an e-mail to the users affected telling them of their new permissions. To stop this behavior, uncheck the "Send

welcome e-mail to the new users" checkbox. If you wish to add a personal message to the email type it in the "Personal Message" text box.

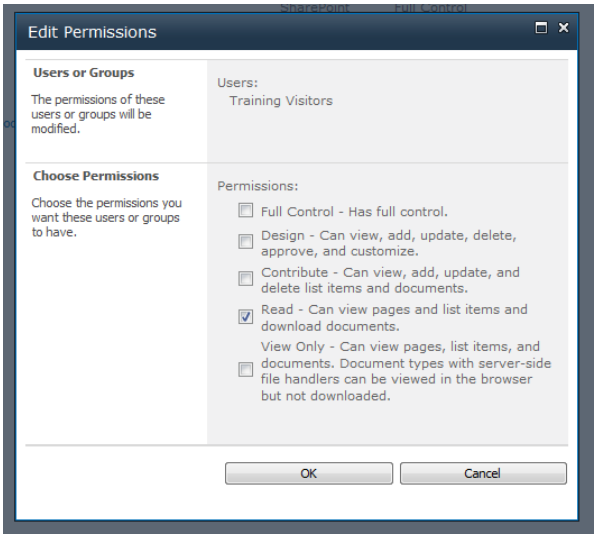
4. When you are satisfied the permissions are correct click the OK button.

Create Group

The create group dialog allows you to create a group and assign it site wide permissions. This dialog is separated into several sections, name and about me description, owner, group settings, membership requests, and give group permission to this site.

1. Name and About Me Description – In this section you must enter a unique name for the new group. There is also a rich text box (formatting allowed) for entering a description of the group.
2. Owner – This defaults to the currently logged in user. If the owner of the group is someone else either enter their AD user id into the box or look them up with the Browse dialog. There can only be one group owner but as Site administrator you have access to all groups.
3. Group Settings – Group Settings sets who can view the membership and permissions of the group. If "everyone" is selected then all logged in users can see the permissions for the group. Also in Group Settings is "Who can edit the membership of the group." This should usually stay on the default of "Group Owner".
4. Membership Requests – With the membership requests section you can control requests to join or leave the group. You can also set the group to automatically add users that request access. This is not recommended unless the group has very limited permissions. If allowed, membership requests will be sent to the e-mail address in the "Send membership requests to the following e-mail address" text box. The default is the email address of the person creating the group.
5. Give Group Permission to this Site – This is where you set the site wide permission for this group. The choices are Full Control, Design, Contribute, Read, and View Only.
    a. Full Control – Has full control of everything on the site/library/file.
    b. Design - Can view, add, update, delete, approve, and customize.
    c. Contribute – Allows the users in the group to view, add, update, and delete list items and documents.
    d. Read – Gives the members read only access to the site.
    e. View Only – This is the most restrictive permission and should be used at the site wide level for most groups. This level allows the user to view only things that can be viewed in the browser but not downloaded.
6. When the group settings are correct click the "Create" button. This does not populate the group except for adding the owner. (See the Grant Permissions Dialog)

Edit User Permissions



The Edit User Permissions dialog allows you to set the permission levels allowed by the user or group. This is the same dialog as the "Give Group Permission to this Site" dialog. The list can be added to with the Permission Levels dialog.

Remove User Permissions

Remove User Permissions button will remove all permissions from the selected users or groups. Although they are removed from the list provided in the permission Tools the group will still exist.

Check Permissions

Check Permissions dialog allows you to check what permissions a user or group has in your site collection.

Permission Levels

Permission Levels page allows you to add special permission levels to your site collection. This allows you to fine tune exactly what users can and cannot do on your site. There are three options.

1. Delete Selected Permission Levels – This will allow you to remove completely most permission levels from your site. "Full Control" and" Limited Access" are excluded. Just select the permission level and click the link then answer "Yes" in the "are you sure" dialog.
2. Add a Permission Level – This will allow you to create a special permission level. See the full list[1]
3. Modify a Permission Level – To modify the permissions allowed on a permission level click its name. Select the permissions you need for this level. Click Submit when finished.

Manage Access Requests

Allow users to request access to your site. To activate this feature, check the box and enter a valid email address.

Site Collection Administrators

The site collection administrators dialog allows you to add/remove full access permission to the site collection. This access overrides all other permissions on the site collection. This should not be used to give edit access to the site collection.

Galleries

There are several galleries in the galleries section of site settings; two are useful to the site collection administrator. Site Columns and Site Content Types, These allow you to define new columns that are useful throughout the site collection and new content types that are available throughout the site collection.

Site Columns

If you have a specific kind of meta-data you want to collect about documents throughout your site, you can define it here. This list contains all possible column types available to the whole site library.

To add a column:

1. Click the "Create" link at the top of the page.
2. In the dialog, give the column a unique name.
3. Select the type of information you want the column to contain.
4. To make it easier to find, select a column group. If you need a new group, type its name in the New Group Box.
5. Enter a description for the column to make it easier for users to see what is supposed to go in this column.
6. The next two radio button sections allow you to require that the column contains information and require unique entries for each item.
7. After this is a column type specific section for defining behaviors of the column based on type. This can include maximum characters, default date information, or a formula.
8. Click the OK button.

To modify or delete a column:

1. Click the column name link in the Site Columns list.
2. In the dialog, you can enter a new name, change the group, modify the column type, change the default settings, and choose to update all lists with this column.
3. If you want to delete the column, click the "Delete" button at the bottom
4. If you want to save changes click the "OK" button.

Site Content Types

If you have a content item (document, list item) that requires specific columns or settings you can create a Content Type for it. Your content type will be based on a current one such as document, or list item.

To Create a Content Type

1. Click the "Create" link at the top of the Site Content Types list.
2. Give it a unique name.
3. Give it a description.
4. Select the parent content type group. (this narrows the list of possible content types)
5. Select the parent content type.

6. Select (or Add) a group for the new content type.
7. Click the “OK” button.
8. This will take you to the content type dialog.
9. The Settings are:
    - Name, Description, and Group – This takes you back to the previous page
    - Advanced Settings – You can use a document template, make the content type read only, and update all content types inheriting from this one (not very useful during create)
    - Workflow Settings – If there will be a workflow associated with this type add it here.
    - Delete This Content Type – This will delete the content type and return you to the content type list.
    - Document Information Panel Settings – This setting allows you to change the template for the document information panel in Office products for this document type. You can also force the document information panel to default to visible on this type of document.
    - Information Management Policy Settings – This page allows you to set policies for the content type such as:
        - Retention – when checked this will allow you to add retention stages such as move to recycle bin, delete permanently, start a workflow. There can be multiple stages.
        - Auditing – This will keep a record when items are opened/viewed, edited, checked out/in, moved, or deleted.
        - Barcodes – This will assign a barcode to each item.
        - Labels – Add a label to insure important information about the item is included when printed.
10. The columns section allows you to add or remove columns and to give them a default order.

Site Administration

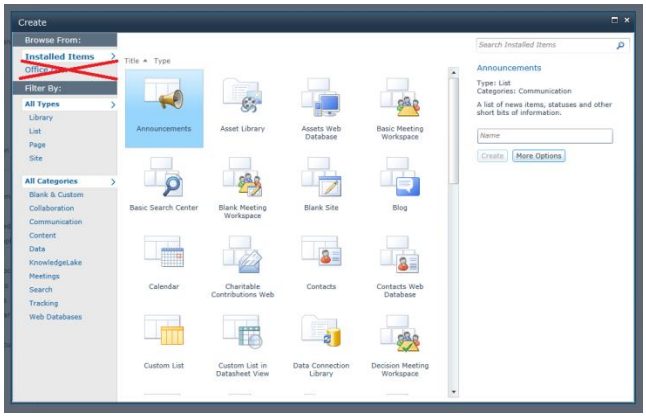
The site administration section of the site settings page gives you control over the actual high level site settings. We will cover Site libraries and lists, and Workflows.

Site libraries and lists

The site libraries and lists dialog is a centralized way of managing all of the libraries and lists in the site.

To create a new library or list

1. Click the “Create new Content” link at the top of the page
2. The create dialog will come up
3. To narrow the items available you can select a type and category from the left column. NOTE: do not use the office.com browse option it will likely lock up you browser.



4. In the center section select the item you want to create.
5. In the right hand column, if asked, give it a unique name and URL (this will be added to the end of your current URL)
6. Click the create button.
7. The new list/library will open. If there is any other configuration required it will display a page for this setup.

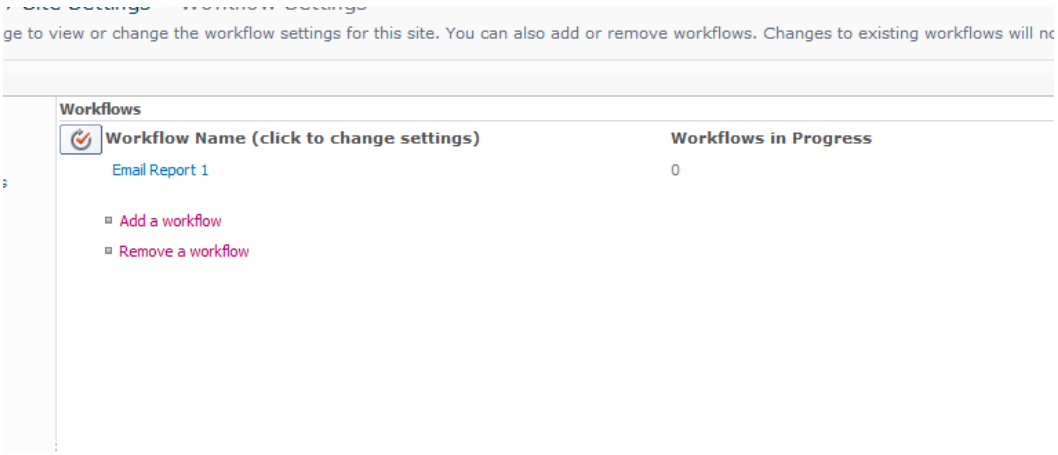
To customize a list or library just select the “Customize” link for it. This will take you to the same page as if you clicked on the library/list settings button on the ribbon.

Workflows

SharePoint has several built in workflows which can be used in your site. In addition you can create simple workflows with SharePoint Designer for use on your site.

The “Workflows” list gives you an overview of all of the installed workflows on your site. The list shows the workflow name, its status (active, inactive), the number of the current workflow associated with the site, and how many of that workflow are in progress.

The “Workflow Settings” page allows you to manage workflows associated with your site. The workflow settings dialog displays any workflows you have associated with your site and their names, the number of each workflow in progress, an add workflow link and a remove workflow link.



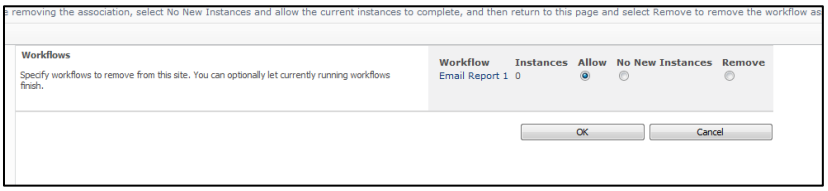
By clicking on the name link of a workflow you can change any of the settings previously entered in the create dialog.

Add a workflow association:

1. Click on the “Add a workflow” link.
2. The workflow properties dialog will come up
    a. Workflow – this section lists all workflows installed on the site collection. Select the one you would like to add to the site.
    b. Name – Enter a unique name for this workflow association.
    c. Task List – This is the task list that the workflow will use to list its tasks assigned. Select one out of the list or create a new task list.
    d. History List – This list will keep any auditing the workflow is programmed to keep. Select a list or create a new one.
    e. Start Options – This will be the default start up option for this workflow (it can be changed when assigned to a document.
    f. If there is an association form for this workflow the “Next” button will take you to that for more information. If not the workflow association will be created.

Remove a workflow:

1. Click on the “Remove a workflow” link.
2. The remove dialog will come up.

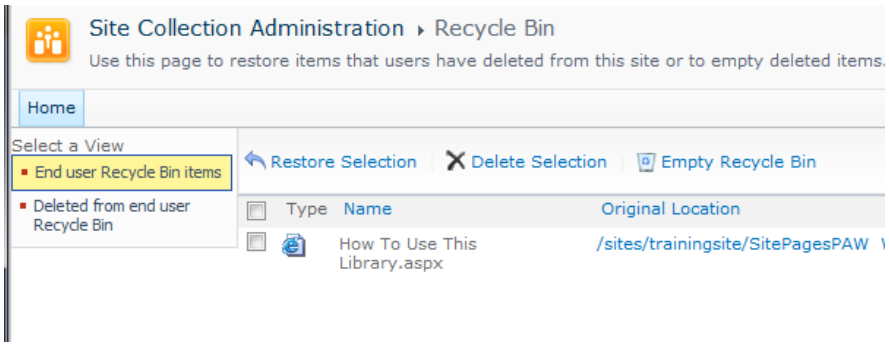


3. For each associated workflow you can choose to continue to allow it to run, keep it associated but don’t allow new instances, or remove it completely.

Site Collection Administration

Recycle Bin

The recycle bin is where items deleted from the site collection will go. The current system setting for retention in the recycle bin is 30 days. After 30 days the items in the recycle bin are moved to the second stage recycle bin.



To restore a file from either the primary or secondary recycle bin:

1. Open the recycle bin
2. Select either "End user Recycle Bin items" for the primary bin or "Deleted from end user Recycle Bin" for the second stage.
3. Check the boxes beside the items you want to restore. If you want to restore all files, check the box at the top of the column.
4. Click on the "Restore Selection" link at the top of the page.

Site Collection Features

The site collection features are the various features that are installed on SharePoint. These features may or may not be turned on in your site. Some will be useful to you, others may be custom items build for other sites. If a site is active it will have a blue box next to it with the word Active in it. To activate a feature, just select the activate button next to its name. To deactivate a feature, select the deactivate button next to it (this is the same button the function just changes based on context).

Policies

If your content has special retention or auditing requirements, this is where you will go to set it. You can create multiple policies for your site and apply them as you see fit on each content type. Each policy can have several stages such as labeling, auditing, and deletion.

SharePoint Designer Settings

This dialog allows you to allow SharePoint designer and some of its features to work on your site.

- Allow Site Owners and Designers to use SharePoint Designer in this Site Collection – Enable this to allow users to edit the site in SharePoint Designer.
- Allow Site Owners and Designers to Detach Pages from the Site Definition –

- Allow Site Owners and Designers to Customize Master Pages and Page Layouts – If you want to allow site designers to customize master pages check this box. Only experienced people should be allowed to do this.
- Allow Site Owners and Designers to See the Hidden URL structure of their Web Site – This is probably a bad idea in general. It is better to give them ownership on an individual basis if you want to allow this.

Look and Feel

Title, Description, and Icon

- Title and Description – This is where you would change the title of the site that is displayed on every page. You can also enter a description of the site that will display on the home page.
- Logo URL and description – If you have a logo available on the internet you can enter the URL here and the logo will display on your page.

Quick Launch

Quick launch is usually displayed on the left hand side of your pages. The Quick Launch properties page allows you to customize it. The main page lists all items that will be included in the quick launch. If you want to change an item just click the edit icon next to it. From here you can change the description and the heading under which it resides.

- New Navigation Link – Allows you to add a link to your quick launch. This allows you to link to any web page you feel is necessary.
- New Heading – Allows you to create a new heading on your quick launch.
- Change Order – Allows you to determine the order items are displayed in the quick launch. To move an item, choose its position in the dropdown beside it.

Top Link Bar

This allows you to order the items in your top navigation bar. These items are generally sub-sites. The options behave the same as the quick launch items of the same name.

Tree View

This item allows you to turn on or off the quick launch and the tree view. The tree view is a list of items under the current site. It usually displays below the quick launch.

Site Theme

This item allows you to modify the colors of the site. There are several built in themes.

Site Actions

Manage Site Features

Allows you to activate or deactivate features on your site. The features will be installed by the SharePoint sys admins centrally and made available to you. SharePoint comes with many features available. If you need a new one installed the sys admins will have to test it thoroughly before they will allow it.

Reset to Site Definition

This control allows you to reset a page, site, or the entire site collection back to the site definition. This means any changes you made to the item will be erased without a backup. Anything changed by this process will be erased completely.

Delete This Site

This will delete the current site contents completely. If this is done at the main site collection the entire site collection will be deleted. Be careful where you are if you use this control. The site will have to be recalled from backup which will likely be at least a day behind due to the backup schedules.

Tricks

Changing a URL after the page/site has been created.

If a site, page, document library, or any other content item was created with a long URL you can re-name the URL without changing the name of the item. EX if a document library was called https://sharepointsecure.louisville.edu/sites/trainingsite/really%20Long%20Library%20with%20Lots%20of%20Spaces/ . You could change it to https://sharepointsecure.louisville.edu/sites/trainingsite/shortname . This will make it easier for users to get to the library in question.

To change the URL open SharePoint Designer (usually available in the "All Programs" menu under "SharePoint") and navigate to your site (https://sharepointsecure.louisville.edu/sites/trainingsite/) . In the left column there will be an item called "All Files" select this. In the right column you will see a listing of all files under current site. Select the item you want to re-name. Select "rename" from the ribbon. This will allow you to change the name of the item in Designer. This change is immediate in the SharePoint site. Sorry this cannot be used to change your main site URL or anything before it.

Note: It is a bad idea to re-name standard items in SharePoint you should restrict you re-names to item created in your site by users.

Use SharePoint Designer to administer your site.

Most of the items above can, if you prefer, be administered from the SharePoint Designer software. SharePoint Designer is available for download from the Microsoft MSDN site at http://msdn.microsoft.com/en-us/sharepoint/hh850380.aspx#2010 . Designer also allows you to create workflows, upload files to your site, and modify the look and feel.

[1] Sharepoint permissions:

List Permissions		
	Manage Lists	Create and delete lists, add or remove columns in a list, and add or remove public views of a list.
	Override Check Out	Discard or check in a document which is checked out to another user.
	Add Items	Add items to lists and add documents to document libraries.
	Edit Items	Edit items in lists, edit documents in document libraries, and customize Web Part Pages in document libraries.
	Delete Items	Delete items from a list and documents from a document library.
	View Items	View items in lists and documents in document libraries.
	Approve Items	Approve a minor version of a list item or document.
	Open Items	View the source of documents with server side file handlers.
	View Versions	View past versions of a list item or document.
	Delete Versions	Delete past versions of a list item or document.
	Create Alerts	Create alerts.
	View Application Pages	View forms, views, and application pages. Enumerate lists.
Site Permissions		

	Manage Permissions	Create and change permission levels on the Web site and assign permissions to users and groups.
	View Web Analytics Data	View reports on Web site usage.
	Create Subsites	Create subsites such as team sites, Meeting Workspace sites, and Document Workspace sites.
	Manage Web Site	Grants the ability to perform all administration tasks for the Web site as well as manage content.
	Add and Customize Pages	Add, change, or delete HTML pages or Web Part Pages, and edit the Web site using a Microsoft SharePoint Foundation compatible editor.
	Apply Themes and Borders	Apply a theme or borders to the entire Web site.
	Apply Style Sheets	Apply a style sheet (.CSS file) to the Web site.
	Create Groups	Create a group of users that can be used anywhere within the site collection.
	Browse Directories	Enumerate files and folders in a Web site using SharePoint Designer and Web DAV interfaces.
	View Pages	View pages in a Web site.
	Enumerate Permissions	Enumerate permissions on the Web site, list, folder, document, or list item.
	Browse User Information	View information about users of the Web site.
	Manage Alerts	Manage alerts for all users of the Web site.
	Use Remote Interfaces	Use SOAP, Web DAV, the Client Object Model or SharePoint Designer interfaces to access the Web site.
	Use Client Integration Features	Use features which launch client applications. Without this permission, users will have to work on documents locally and upload their changes.
	Open	Allows users to open a Web site, list, or folder in order to access items inside that container.
	Edit Personal User Information	Allows a user to change his or her own user information, such as adding a picture.
Personal Permissions		
	Manage Personal Views	Create, change, and delete personal views of lists.
	Add/Remove Personal Web Parts	Add or remove personal Web Parts on a Web Part Page.
	Update Personal Web Parts	Update Web Parts to display personalized information.