MODULE 13 Exploring Site Collection Administrator Settings

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Module Overview

This module explains how to use other tools and settings in SharePoint 2016. Site collection administrators or site administrators configure these as part of their day-to-day activities.

After completing this module, students will be able to:

• Identify additional settings for site collection administrators

• Identify additional settings for site administrators

Lesson 1: Exploring Settings for Site Collection Administrators

There are specific responsibilities of SharePoint site collection administrators and site owners necessary to maintain the environment. These range from setting up site collection or site level functionality, SharePoint advanced configuration or SharePoint usage reports. Functionality is dependent on permissions for the site collection or the site.

Hierarchy within SharePoint is based on two different types of administration: Site collection administration and site administration. It is possible to have different individuals for each position, making it very important that information is shared between the site collection administrator and the individual site administrators.

By default, site collection administrators have the ability to configure master page customization and to manage site level settings for searching, auditing and object caching. They also have direct control of which features are enabled within the site collection, which include SharePoint Enterprise and Standard features. Many changes made here will also affect SharePoint sites that live within the site collection.

It is not recommended to have many site collection administrators. One or two site collection administrators, per site collection is enough, but this may change if site collection usage grows significantly.

Site Collection Features

A feature in SharePoint is an enhancement or added functionality that can be activated and deactivated as a unit. Examples of features include document sets, workflows and the Content Organizer. Features are installed at a scope level, either at the site collection level or at the site level. They are managed from the Site Settings page under their respective links. The site collection features are accessed from the Site Settings page of the top-level site. These features include the following:

• Custom Site Collection Help: Creates a Help library that can be used to store custom help for this site
· **Document ID Service**: Assigns IDs to documents in the site collection, which can be used to retrieve items independent of their current location.

· **Document Sets**: Provide the content types required for creating and using document sets; create a document set when administrators want to manage multiple documents as a single work product.

· **In Place Records Management**: Enables the definition and declaration of records in place.

· **Publishing Approval Workflow**: Routes a page for approval; approvers can approve or reject the page, reassign the task or request changes to the page.

· **Reporting**: Creates reports about information in Microsoft SharePoint Foundation.

· **SharePoint Server Enterprise Site Collection features**: Includes features such as Visio Service, Access Services and Excel Services application in the SharePoint Server Enterprise license.

· **SharePoint Server Standard Site Collection features**: Includes features such as user profiles and search in the SharePoint Server Standard license.

· **Other various features**: Can include out-of-the-box features or customized features that are deployed by the SharePoint administrator.

**Site Collection Popularity and Search Reports**

There are several reports to provide insight into search and the overall popularity of content within a site. These reports can be found by clicking *Settings > Site Settings > Site Collection Administration > Popularity and Search Reports*.

### Navigating to popularity and search reports

The following table lists the reports that are available within this section.

<table>
<thead>
<tr>
<th>Heading</th>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usage Reports</td>
<td>Usage</td>
<td>This report shows historical usage information about the site collection, such as the number of views and unique users. Administrators use this report to identify usage trends and to determine times of high and low activity.</td>
</tr>
<tr>
<td></td>
<td>Number of Queries</td>
<td>This report shows the number of search queries performed. Administrators use this report to identify search query volume trends and to determine times of high and low search activity.</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Heading</th>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Top Queries by Day/Month</td>
<td>This report shows the most popular search queries. Administrators use this report to understand what types of information visitors are seeking.</td>
</tr>
<tr>
<td></td>
<td>Abandoned Queries by Day/Month</td>
<td>This report shows popular search queries that received low click-through. Administrators use this report to identify search queries that might create user dissatisfaction and to improve the discoverability of content. Then, they consider using query rules to improve the query's results.</td>
</tr>
<tr>
<td></td>
<td>No Result Queries Day/Month</td>
<td>This report shows popular search queries that returned no results. Administrators use this report to identify search queries that might create user dissatisfaction and to improve the discoverability of content. Then, they consider using query rules to improve the query's results.</td>
</tr>
<tr>
<td></td>
<td>Query Rule Usage by Day/Month</td>
<td>This report shows how often query rules fire, how many dictionary terms they use, and how often users click their promoted results. Administrators use this report to see how useful their query rules and promoted results are to users.</td>
</tr>
</tbody>
</table>

Site Hierarchy

This option shows the hierarchy of the different sites to the administrator, and includes a link to navigate directly to the site. Also included is a Manage link, which goes directly to Site Settings for that particular SharePoint site.

Site hierarchy can be found by clicking Settings > Site Settings > Site Collection Administration > Site hierarchy.

Navigating to site hierarchy

https://skillpipe.com/#/reader/urn:uuid:9e691a33-42d3-4176-b322-412dee76a30f@2022-02-23T14:00:00Z/content
Site Collection Navigation

This setting allows administrators to disable features such as those listed below.

- **Navigation Enabled**: Determines whether navigation links are shown across the top or on the sides of pages. Disable navigation will hide any navigation bars on pages within this site collection.

- **Security Trimming**: Determines whether navigation links are hidden if the user does not have access to the destination of the link.

- **Audience Targeting**: Determines whether navigation links are hidden if the user is not in the audience specified for the link.

Site collection navigation can be accessed via **Settings > Site Settings > Site Collection Administration > Site Collection Navigation**.

Site Collection Audit Settings

Within a site collection, it is important to keep track of sites, lists, libraries, documents and other items, especially if it involves the security of data. Auditing will help keep track of information at each of the SharePoint levels.

Auditing options include:

- **Document and Items**: Opening, downloading, viewing, editing, checking out and checking in, moving or copying, and deleting or restoring

- **Lists, Libraries and Sites**: Editing content types and columns, searching site content, and editing users and permissions

Using site collection auditing to keep track of editing users and permissions is a great way to document permissions within the site collection.

Site Collection Audit Settings can be found by clicking **Settings > Site Settings > Site Collection Administration > Site Collection Audit Settings**.
Site collection audit settings

Audit Log Reports

Audits that are set up in the site collection audit settings will generate reports that are available within the Audit Log Reports section. They will also generate other reports that are created by various activities within SharePoint. These reports are divided into different groupings:

- **Content Activity Reports**: Includes content modifications, content type and list modifications, content viewing and deletion.

- **Custom Reports**: Includes custom reports that allows user to specify specific location, data range and events to report including:
  - Opening or downloading documents
  - Editing items
  - Checking items in or out
  - Moving or copying items to another location in the site
  - Deleting or restoring items
  - Editing content types and columns
  - Searching site content
  - Editing users and permissions
  - Editing auditing settings and deleting audit log events
  - Workflow events
  - Custom events

- **Information Management Policy Reports**: Includes expiration of disposition of content, and tracking of the
creation and use of information management policies.

- **Security and Site Settings Report**: Examines auditing settings and security settings as well as events that change their overall settings.

Audit Log Reports can be found by clicking **Settings > Site Settings > Site Collection Administration > Audit Log Reports**.

**Help Settings**

This gives the site collection administrator specific options to allow users to access Help. Depending upon which features are installed on SharePoint, different Help packages will be available. Help settings can be found by clicking **Settings > Site Settings > Site Collection Administration > Help Settings**.

**Help settings**

**Policies**

Site owners are often responsible for what types of policies should be available for specific content types. They are also responsible for the lifecycle of a site including when it is no longer needed.

**Site Policies**

Site collection administrators can define specific policies for the retention and deletion of sites within a particular site collection. These policies are made available to the site administrators who are responsible for defining and managing the lifecycle of a site.

1. Click **Settings > Site Settings > Site Collection Administration > Site Policies**.
2. Type a **Name** for the site policy.
3. Type a **Description** for the policy.
4. Determine the behavior for the sites that are under this policy.
   a. When selecting **Delete sites automatically**, determine additional parameters for the **Deletion Event** and set notification settings.
Site auto delete settings

OR

b. When selecting Close and delete sites automatically, determine additional parameters for the Close Event and set notification settings.

Site close and delete settings

Content Type Policy Templates

In addition to site retention policies, site collection administrators can configure specific retention and auditing policies for use with content types. These policies are focused on items and documents within a particular site.
collection. Often, content type policies are used in conjunction with SharePoint’s records management features, including starting a workflow or transferring files to a different location such as a Records Center.

1. Click **Settings > Site Settings > Site Administration > Content Type Policy Templates**.
2. Type a **Name** for the policy.
3. Type a **Description** for the policy.
4. Determine the behavior for the policy, and then click **OK**. Refer to the following table for details on the different policy behaviors.

<table>
<thead>
<tr>
<th>Policy</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retention</td>
<td>Retention schedules how content is managed and disposed of by specifying a sequence of retention stages. If administrators specify multiple stages, each stage will occur one after the other in the order they appear on this page.</td>
</tr>
<tr>
<td>Auditing</td>
<td>Auditing specifies the events that should be audited for documents and items subject to this policy that are written to the audit log reports.</td>
</tr>
<tr>
<td>Barcodes</td>
<td>Barcodes assign a barcode to each document or item. Optionally, Microsoft Office applications can require users to insert these barcodes into documents.</td>
</tr>
<tr>
<td>Labels</td>
<td>Administrators can add a label to a document to ensure that important information about the document is included when it is printed. To specify the label, they type the text they want to use in the Label format box. They can use any combination of fixed text or document properties, except calculated or built-in properties such as GUID or CreatedBy. To start a new line, use the \n character sequence.</td>
</tr>
</tbody>
</table>

**Lesson 2: Exploring Settings for Site Administrators**

Administrators or SharePoint owners, who manage a site, have some of the same responsibilities and rights that a site collection administrator has, but at the site level only. Some functionality can only be managed at the site level; including RSS, search visibility and deleting the site.

Site administrators do not have permissions to configure properties in any other site. It is highly recommended that a minimal number of SharePoint owners/administrators be given permissions within a given site.

**Manage Site Features**

The options found in manage site features allow site administrators to enable or disable specific feature sets that are available at the site level. Some of these features may already be disabled at the site collection level and would affect the site levels. Site features include:

- **Community Site Feature**: Adds community functionality such as discussion categories, content and people reputation, and the members list.
- **Content Organizer**: Creates metadata-based rules that move content submitted to a site to the correct library or folder.
- **Following Content**: Enables users to follow documents or sites.
- **Hold**: Tracks external actions like litigations, investigations, or audits that require site administrators to suspend the disposition of documents.
- **Metadata Navigation and Filtering**: Provides each list in the site with a settings page for configuring that list to
use metadata tree view hierarchies and filter controls to improve navigation and filtering of the contained items.

- **SharePoint Server Enterprise Site features**: Includes features such as Visio Services, Access Services, and Excel Services application, which are included in the SharePoint Server Enterprise license.

- **SharePoint Server Standard Site features**: Includes features such as user profiles and search, which are included in the SharePoint Server Standard license.

- **Other various features**: Can include out-of-the-box features or customized features that are deployed by the SharePoint administrator.

**Activating a Site Feature**

1. To access manage site features, click Settings > Site Settings > Site Actions > Manage site features.

2. To activate a feature, click the **Activate** button. Or, to deactivate, click the **Deactivate** button.

3. In the **Warning** window, click the **Deactivate this feature** link.

**Site Closure and Deletion**

Site administrators are responsible for the lifecycle of a site including when it should be deleted. The site closure and deletion settings, within SharePoint 2016, allow site owners the ability to select from a set of predefined policies for how a site should be closed or deleted automatically.

1. Click Settings > Site Settings > Site Administration > Site Closure and Deletion.
2. Select a site policy from the list of available options and click **OK**.
3. Click **Site Closure and Deletion** again to view the applied policy.
4. Type a **Description** for the policy.
5. Either close the site immediately, postpone the policy or select a new policy.

Verifying a policy is in place

Site Content and Structure

Site content and structure allows a site administrator to discover, manage and maintain the structure and contained information within SharePoint.

Site content and structure can be found by clicking Settings > Site Settings > Site Administration > Content and structure.

Content and structure

The Site Content and Structure window is divided into two sections:

- The left panel is Navigation, which allows site owners to view the contents within a site.
- The right panel is Content and Management, where site owners can perform a variety of functions with content including:
  - Copy documents or list items
  - Move documents or list items between lists, libraries, sites and/or site collections
  - Delete content
  - Check in, check out, discard check out
  - Publish or un-publish content
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- Navigate within all sites in the site collection
- Show related resources
- Open up site and list settings

To perform an action, expand the navigation section to locate the site, list or library.

1. Place a check to select the item in the **Content and Management** panel.
2. Click **Actions** to view the list of available commands.

**Actions in content and structure**

The Content Organizer is meant to move files or list items within or between sites. It is not meant to move a document library or list between sites collections. Administrators must first create the new document library or list and then use the Content and Management panel to move the selected contents to the new list.

**Viewing a site structure**
It is considered best practice to use the Content and Management pane if metadata retention is important when moving content from one location to another.