

# New SharePoint Site Collection / Site Set-Up

## Introduction

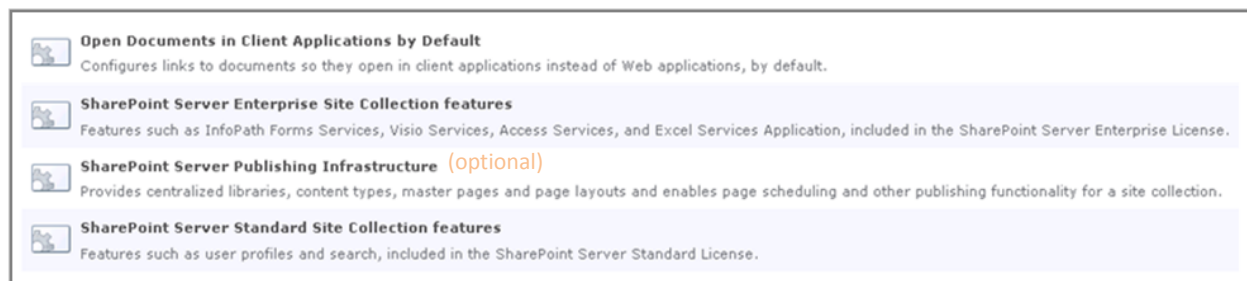
A new Site Collection is also a new Site (though not all new Sites are new Site Collections). This document covers setting up both the new Site Collection and the new Parent Site. It is reasonable, however, that one could extrapolate from this document to a certain degree and set up any sub-site based on the New Site Set-Up section.

## New Site Collection Set-Up

### Site Collection Features

» Site Actions > Site Settings > Site Collection Administration > Site Collection Features

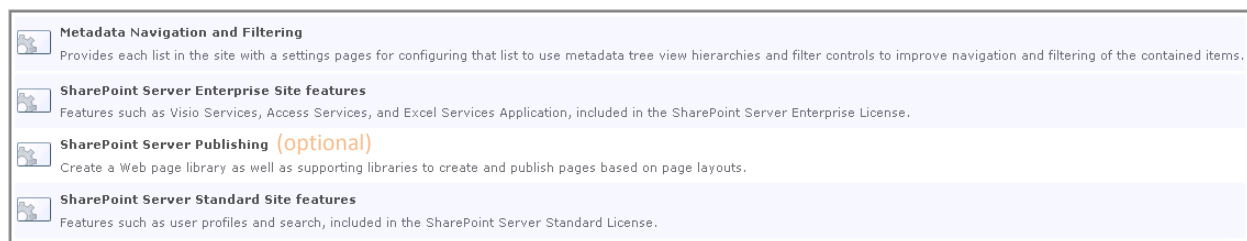
At a minimum, the following Site Collection Features should be Activated.



### Site Features

» Site Actions > Site Settings > Site Actions > Manage Site Features

At a minimum, the following Site Features should be Activated.



Deactivate the 'Wiki Page Home Page' Site Features if it is Activated. Wiki pages tend to be troublesome for Site Admins to edit and to add web parts to. (This is largely due to its incompatibility with IE8. If you want to leave the 'Wiki Page Home Page' Site Features Activated, there are ways to facilitate editing the page. When we upgrade our browser to a newer version, the deactivating of the Wiki Home Page feature should be revisited.)

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### Master Page (optional)

» Site Actions > Site Settings > Galleries > Master Pages & Page Layouts

The default Master Page is [redacted] branded. To brand the site as [redacted], the [redacted] Master Page Template ([redacted].master) and [redacted] Logo ([redacted].jpg) files need to be uploaded and applied. You must have the 'SharePoint Server Publishing Infrastructure' Site Collection and 'SharePoint Server Publishing' Site Features Activated to be able to upload/apply the [redacted] Master Page and logo.

### Steps

1. Go to Master Pages & Page Layouts
2. On the Documents tab, click the Upload button.
3. Browse, select, and upload the [redacted].master.\*

Master Page Gallery - [redacted].master

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The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Items on this list require content approval. Your submission will not appear in public views until approved by someone with proper rights. [More information on content approval.](#)

Content Type: Publishing Master Page

Name: [redacted].master

Description:

Compatible UI Version(s):  
 3  
 4

Contact:

Preview Image:  
Type the Web address: ([Click here to test](#))  
http://  
Type the description:

Hidden Page:

Save Cancel

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- Browse, select, and upload the [redacted].\* As with [redacted].master, set the Content Type to 'Publishing Master Page' and click Check In.
- Sort the Master Page Gallery by Modified in Decreasing order, so that the two files you just uploaded are at top.
- For both files:
  - Click the drop-down arrow that appears when you hover over the file name. Select 'Publish a Major Version' > OK.
  - Click the drop-down arrow that appears when you hover over the file name. Select 'Approve/Reject' > 'Approve' > OK.

\* You may find it easiest to either save a copy of the files from the [redacted] library to your desktop or map to the Intranet Team library prior to starting these Steps.

» Site Actions > Site Settings > Look & Feel > Master Page

Now that the files are in the Master Page Gallery, they can be applied to the site.

- Go to Master Page.
- For both Site Master Page and System Master Page, select '[redacted] master' from the drop-down and check the box so sub-sites inherit the branding as well. Then click OK.

<b>Site Master Page</b> The site master page will be used by all publishing pages. Select the first option to inherit the site master page of the parent site. Select the second option to select a unique master page. Check the box to apply this setting to all subsites.	<input type="radio"/> Inherit site master page from parent of this site <input checked="" type="radio"/> Specify a master page to be used by this site and all sites that inherit from it: [redacted] master <input checked="" type="checkbox"/> Reset all subsites to inherit this site master page setting
<b>System Master Page</b> Use the system master page for all forms and view pages in this site. Select the first option to inherit the system master page of the parent site. Select the second option to select a unique master page. Check the box to apply this setting to all subsites.	<input type="radio"/> Inherit system master page from parent of this site <input checked="" type="radio"/> Specify a system master page for this site and all sites that inherit from it: [redacted].master <input checked="" type="checkbox"/> Reset all subsites to inherit this system master page setting

### Site Access

» Site Actions > Users & Permissions > Site Collection Administrators

Edit the membership of the Site Collection Administrators as appropriate. You may want to include the [redacted] NT group as a Site collection Administrator; this enables anyone on the [redacted] to assist with the site (e.g., for enhancements or troubleshooting).

## New SharePoint Site Collection / Site Set-Up

### New Parent Site Set-Up

Now that the Site Collection settings have been configured, the remaining Parent Site adjustments can be made.

#### *Site Name*

» Site Actions > Site Settings > Look & Feel > Title, Description & Icon

Adjust the Title as needed so that it appears as desired in the header and breadcrumbs (e.g., replace abbreviations/acronyms, add in spaces, etc.). Consider deleting any text in the Description field; leaving it may result in pages looking 'cluttered'. Change the icon, which by default is the orange square with people icon, as desired.

#### *Home Page*

» Site Actions > Edit Page

Add, delete, edit, configure, and arrange web parts as necessary. Among the web parts that should be on the home page are:

- Add a Content Editor Web Part to the Right Zone; entitle it 'Contact Information' and set the Chrome to 'Title Only'. In the text area, include the following paragraph (or similar):  
"This site and its content are managed by [insert group name]. For questions, comments, or to suggest updates, please contact:"
- Below the Contact Information web part, add a Contact Details web part for each site contact. To configure the web part, select Edit Web Part from the web part's drop-down menu. Enter the person's name in the Contact Details Tool Pane section. In the Miscellaneous section, make sure the 'Display Contact Job Title' check box is unchecked. (Generally, the titles it shows for people are wrong, so better not to show them.) In the Appearance section, set the Chrome to 'None'.

#### *Site Access*

» Site Actions > Users & Permissions > People & Groups

» Site Actions > Site Permissions or » Site Actions > Users & Permissions > Site Permissions

Add, delete, edit, and configure user groups and user groups' memberships and site permissions as needed. Adjust permissions at more granular levels as needed. Edit the membership of the Site Collection Administrators as appropriate.

#### *Navigation*

» Site Actions > Site Settings > Look & Feel > Navigation

Add, delete, edit, target, and arrange navigation links and navigation settings as needed.

## New SharePoint Site Collection / Site Set-Up

### Para-SharePoint 'Set-Up'

In addition to configuring Site Collection and Site Features, some complementary actions should also be taken, and viewed as part of the comprehensive site set-up process.

#### Training

Anyone being given Site Collection Administrators rights should complete the 'SharePoint 2010 Certified Technical Manager/Site Administrator Training ([redacted])'. This training is also recommended for Site Owners. 'Push' this training aggressively, indicating that it should be completed before site launch/hand-off. The following message can be emailed to Site Collection Administrators/Site Owners:

"We highly recommend that you do the 'SharePoint 2010 Certified Technical Manager/Site Administrator Training ([redacted])'. It takes about 2 hours, but can be started/stopped/resumed as needed. This training provides solid foundational information about SharePoint *as it is used and configured here at [redacted]*. Here's the link:

- Certified Technical Manager/Site Administrator Training on iLearn: [redacted] > iLearn > Self Service > Learning > Search Catalog > search (in the Code field) '[redacted]'

Additionally, the Collaborate Community Manager module in iLearn is very helpful as much of it focuses on how to do common SharePoint tasks.

- Collaborate Community Manager Certification Training on iLearn: [redacted] > iLearn > Self Service > Learning > Search Catalog > search (in the Code field) '[redacted]'

#### Original Request

Compare the original request and subsequent email threads/meeting notes to ensure all agreed-upon features/functionality have been incorporated into the site. Validate that what was asked for is what is being delivered.