Microsoft

Step by Step

Microsoft® SharePoint® Designer 2010

Build *exactly* the skills you need.
Learn at the pace *you* want.

Get **practice files** and **online edition** of this book
See back

Penelope Coventry

The smart way to build applications with Microsoft® SharePoint® Designer 2010—one step at a time!

Experience learning made easy—and quickly teach yourself how to create SharePoint 2010 applications and workflows with Microsoft SharePoint Designer 2010. With *Step by Step*, you set the pace—building and practicing the skills you need, just when you need them!

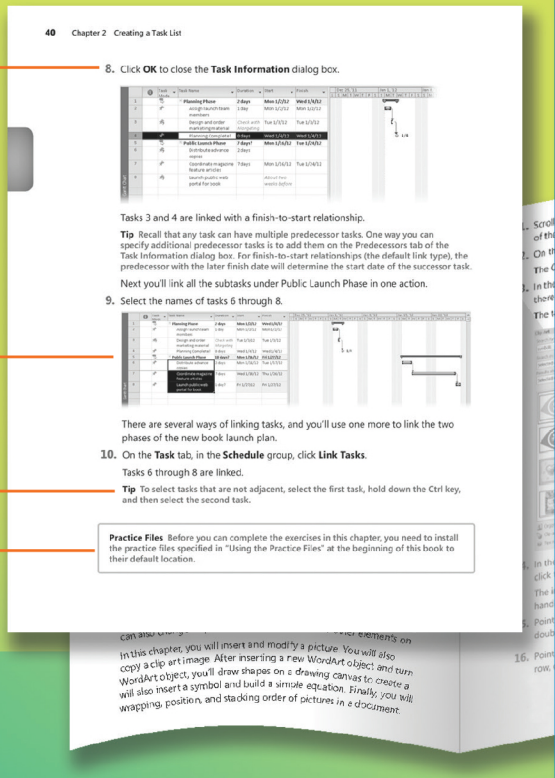
- Design solutions to meet your business scenario—without code
- Customize lists, libraries, and SharePoint site pages
- Use Web Parts to display, edit, and modify list item data
- Access data from a variety of external sources
- Create workflows to automate business processes
- Use master pages and CSS to control how sites work

1 Follow the easy numbered steps

2 Use screenshots to check your work

3 Get helpful tips and pointers

4 Build your skills hands-on using ready-made practice files


40 Chapter 2 Creating a Task List

8. Click **OK** to close the **Task Information** dialog box.

Tasks 3 and 4 are linked with a finish-to-start relationship.

Tip Recall that any task can have multiple predecessor tasks. One way you can specify additional predecessor tasks is to add them on the Predecessors tab of the Task Information dialog box. For finish-to-start relationships (the default link type), the predecessor with the later finish date will determine the start date of the successor task.

Next you'll link all the subtasks under Public Launch Phase in one action.

9. Select the names of tasks 6 through 8.

There are several ways of linking tasks, and you'll use one more to link the two phases of the new book launch plan.

10. On the **Task** tab, in the **Schedule** group, click **Link Tasks**.

Tasks 6 through 8 are linked.

Tip To select tasks that are not adjacent, select the first task, hold down the Ctrl key, and then select the second task.

Practice Files Before you can complete the exercises in this chapter, you need to install the practice files specified in "Using the Practice Files" at the beginning of this book to their default location.

In this chapter, you will insert and modify a picture. You will also copy a clip art image. After inserting a new WordArt object and turn WordArt object, you'll draw shapes on a drawing canvas to create a will also insert a symbol and build a simple equation. Finally, you will wrapping, position, and stacking order of pictures in a document.

Your *Step by Step* digital content includes:

- All the book's **practice files**—ready to download and put to work. *See "Using the Practice Files," inside.*
- Fully searchable **online edition** of this book—with unlimited access on the Web. *Free online account required; see inside back.*

ISBN: 978-0-7356-2733-8

U.S.A. $39.99
Canada $45.99
[*Recommended*]

Microsoft Office/ Microsoft SharePoint

Is this the right SharePoint book for you? See page xvii.

Microsoft

Microsoft®

Microsoft® SharePoint® Designer 2010

Step by Step

Penelope Coventry

Microsoft®

Microsoft® SharePoint® Designer 2010

Step by Step

Penelope Coventry

Copyright © 2010 Penelope Coventry.

Complying with all applicable copyright laws is the responsibility of the user. All rights reserved. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without express written permission of Microsoft Press, Inc.

ISBN: 978-0-7356-2733-8

5 6 7 8 9 10 11 12 13 LSI 8 7 6 5 4 3

Printed and bound in the United States of America.

Microsoft Press titles may be purchased for educational, business or sales promotional use. Online editions are also available for most titles (*http://my.safaribooksonline.com*). For more information, contact our corporate/institutional sales department: (800) 998-9938 or send comments to *mspinput@ microsoft.com*.

Microsoft, Microsoft Press, ActiveX, Excel, FrontPage, Internet Explorer, PowerPoint, SharePoint, Webdings, Windows, and Windows 7 are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Other product and company names mentioned herein may be the trademarks of their respective owners.

Unless otherwise noted, the example companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, e-mail address, logo, person, place, or event is intended or should be inferred.

This book expresses the author's views and opinions. The information contained in this book is provided without any express, statutory, or implied warranties. Neither the author, Microsoft Corporation, nor their respective resellers or distributors, will be held liable for any damages caused or alleged to be caused either directly or indirectly by such information.

Acquisitions and Development Editors: Juliana Aldous and Kenyon Brown
Production Editor: Rachel Monaghan
Copy Editor: John Pierce
Technical Reviewers: Sara Windhorst and Marlene Lanphier
Proofreader: Nancy Sixsmith
Indexer: Ginny Munroe
Cover Designer: Karen Montgomery
Compositor: Nellie McKesson
Illustrator: Robert Romano

[2013-09-20]

This book is dedicated to the memory of my goddaughter, Nia Kate Griffiths, who died at the age of 21. She suffered from cystic fibrosis, and although she was relatively fit all her life, the last four years were tough on her. No matter how ill she was or the number of visits to the hospital she had to endure, she was always a happy person and a treasure to know.
She will be missed.

Contents

Acknowledgments xv
Is This the Right SharePoint Book for You? xvii
Introduction xix
Using the Practice Files xxi
Getting Help xxix
Features and Conventions of This Book xxxi

Part 1 **Getting Started with Microsoft SharePoint Designer 2010**

1 Exploring SharePoint Designer 2010 1

Understanding SharePoint Designer 2010 3
Using SharePoint Designer to Carry Out Common Tasks 4
Understanding What's New in SharePoint Designer 2010 6
Creating Sites with SharePoint Designer 8
Exploring the SharePoint Designer Shell 13
Using SharePoint Designer to Explore a Web Page 20
Using Task Panes 26
Controlling the Use of SharePoint Designer 32
Key Points 33

2 Working with SharePoint Sites 37

Changing the Title, Description, and Theme of a Site 38
Managing Site Users and Permissions 41
Creating a Site Hierarchy 45
Deleting a SharePoint Site 48
Resetting a Site Template 49
Exploring a SharePoint Site 52

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit:

microsoft.com/learning/booksurvey

Navigating a Site's Components 56
Saving and Using a Site Template 60
Key Points 64

Part 2 Working with Information

3 Working with Lists and Libraries 69

Creating Lists and Libraries 70
Creating an Issue Tracking List 74
Importing Data into SharePoint 76
Working with List Columns 77
Using Calculated Columns 80
Using Column Validation 81
Creating an XSLT List View Web Part 83
Customizing an XSLT List View Web Part 86
Securing a List or a Library 88
Adding Custom Actions 89
Creating Server Ribbon Custom Actions 93
Creating Site Columns 94
Using Site Columns 96
Creating Content Types 98
Adding a Site Column to a Content Type 100
Adding a Document Template to a Content Type 101
Associating Content Types with Lists and Libraries 103
Deleting SharePoint Objects 105
Key Points 107

4 Creating and Modifying Web Pages 109

Inserting Text, ScreenTips, Hyperlinks, and Images 110
Working with Web Parts 114
Changing the Home Page for a Web Site 119
Modifying a List View Page 121
Creating List View Pages 123
Creating and Modifying a List Form Page 125
Creating an ASP.NET Page 130
Inserting a Web Part Zone 132

Attaching a Master Page 134
Managing Web Pages 137
Key Points 140

5 Working with Data Views 143
Creating a Data View 144
Customizing Data Views 149
Inline Editing 152
Applying Conditional Formatting 154
Showing and Hiding Content 157
Using XSLT 160
Using Formula Columns 163
Working with XPath Expressions 165
Deploying Web Parts 168
Key Points 171

6 Working with Data Sources 173
Using Data Sources 174
Working with XML Data 180
Connecting to an RSS Feed XML File 183
Connecting to an RSS Feed Server-Side Script 185
Connecting to SOAP Services 188
Connecting to REST Services 190
Connecting to a Database 192
Using Linked Sources 197
Connecting Web Parts 202
Key Points 205

7 Using Business Connectivity Services 207
What Is Business Connectivity Services? 208
Creating Database External Data Sources 211
Creating External Content Types 216
Creating Office Application External Content Types 222
Creating and Managing External Lists 225
Working with Office Application External Content Types 228
Exporting and Using the BDC Model 230

Creating a Profile Page 233
Using Associations 237
Managing External Content Types 242
Key Points 244

Part 3 Using Workflow

8 Understanding Workflows 249

Working with Workflows 250
Creating Workflows with SharePoint Designer 253
Using Actions and Conditions 258
Modifying a Workflow 264
Deploying Workflows 267
Creating a Multistep Workflow 273
Creating a Site Workflow 275
Using Visio to Map a Workflow 277
Importing a Workflow from Visio 281
Exporting a Workflow to a Visio Drawing 283
Removing and Deleting Workflows 285
Key Points 287

9 Using Reusable Workflows and Workflow Forms 289

Creating and Using Reusable Workflows 290
Creating Association Columns 293
Using Workflow Templates 294
Reusing Globally Reusable Workflows 295
Creating Globally Reusable Workflows 298
Creating Initiation and Association Forms 301
Retrieving Values from Initiation Forms 305
Modifying an InfoPath Form 308
Publishing an InfoPath Form 313
Modifying Initiation Form Parameters 316
Modifying an Association Form 318
Adding Association Fields to Initiation Forms 319
Modifying Task Forms 322
Key Points 324

Part 4 Advanced Customizations

10 Branding SharePoint Sites 327

Setting the CSS and Color Coding Page Editor Options . . . 329
Identifying Styles in Cascading Style Sheets . . . 333
Identifying Styles on Content Pages . . . 339
Creating and Attaching CSS Files . . . 340
Creating a Functioning HTML Page . . . 344
Creating Styles . . . 346
Modifying and Deleting Styles . . . 349
Using the Style Application Group Commands . . . 353
Understanding SharePoint's CSS Inheritance . . . 356
Using IntelliSense to add CSS . . . 359
Using CSS Reports . . . 362
Key Points . . . 364

11 Working with Master Pages 367

Understanding Master Pages . . . 368
Default Master Pages . . . 370
Controls Used on the Master Page . . . 372
Copying and Saving a Master Page . . . 377
Customizing a Master Page . . . 379
Changing the Default Master Page . . . 385
Managing Content Placeholders . . . 387
Creating a Web Page from a Master Page . . . 391
Exporting Master Pages . . . 395
Resetting a Master Page to the Site Definition . . . 396
Key Points . . . 398

12 Understanding Usability and Accessibility 401

Implementing a User-Centered Design Methodology . . . 402
Establishing User and Compatibility Requirements . . . 404
Designing a Prototype . . . 408
Defining Accessible Branding . . . 411
Testing for Usability . . . 414
Understanding Accessibility Legislation and Testing . . . 418
Maintaining Legislation Compliance . . . 423
Key Points . . . 427

13 Managing Web Content in the SharePoint Server Environment 429

Creating a Publishing Site 431
Understanding Web Content Management in SharePoint Server 2010 433
Understanding the Page Model 438
Creating a Page Layout 442
Modifying a Page Layout 447
Allowing Users to Rate Web Content 449
Approving a Page Layout 451
Restoring an Earlier Version of a Page Layout 453
Detaching and Reattaching a Page Layout 454
Key Points 456

14 Using Controls in Web Pages 459

Working with the Ribbon and Tag Properties Task Pane 460
Using a Standard ASP.NET Server Control 464
Validating User Data Entry 466
Using ASP.NET Validation Controls 468
Using SharePoint Data View Controls 472
Testing an ASP.NET Form 475
Using SharePoint Server Controls 476
Key Points 479

A SharePoint Designer Workflow Conditions and Actions 481

Conditions 481
Core Actions 483
Document Set Actions 485
List Actions 485
Relational Actions 488
Task Actions 488
Task Behavior Actions 488
Utility Actions 490

B Creating a New Approval Process 491

C Administrative Tasks Using SharePoint 2010 503

Installing SharePoint Foundation 2010 504
Creating a Site Collection 506
Enabling All Site Templates on a SharePoint Server Site 507
Restricting the Use of SharePoint Designer 2010 at the Web-Application Level 508
Configuring Permissions on External Content Types 510
Configuring the External Content Type Profile Page Host 511
Enabling or Disabling User-Defined Workflows 511

Glossary 515

Index 521

About the Author 555

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit:

microsoft.com/learning/booksurvey

Acknowledgments

I want to thank my husband for his continued support while I wrote yet another book. I don't know why I write books. This one should have been easier; however, they are never easy and place a considerable amount of strain on my personal and professional life. Yet again, I ignored my husband and my dog, Poppy, but they still love me and are pleased to see me in those odd moments when I leave my computer. I don't understand why I'm so lucky to have both of them in my life.

I'd like to thank Kenyon Brown (O'Reilly Media Senior Content Development Editor), Rachel Monaghan (O'Reilly Media Senior Production Editor), John Pierce (copy editor), Sara Windhorst (technical reviewer), Marlene Lanphier (technical reviewer), and all the other people who kept me on track and provided such excellent suggestions.

I would like to include a special thanks to my contributing authors, Nikander and Margriet Buggeman, Heather Waterman, and Nikki Ashington, whose knowledge added greatly to this book.

Lastly, I would like to thank the members of the SharePoint User Group U.K. and my fellow SharePoint MVPs. I am truly honored to be part of this unique community, and I have learned much from their blog posts, presentations, books, and discussions.

Thank you all!

—Penny Coventry

Is This the Right SharePoint Book for You?

This book is about Microsoft® SharePoint® Designer 2010, but before you buy it, please read the following guidelines to learn why you should or should not be using this book.

Note SharePoint Designer 2010 is not a Web authoring tool. If you want to learn how to create Web pages on non-SharePoint Web sites, use a different product such as Microsoft Expression Web.

Buy This Book

This book is for you if:

- You have access to Microsoft SharePoint 2010, either Microsoft SharePoint Foundation 2010, Microsoft SharePoint Server 2010, or both products in your organization.
- You want to create and manage SharePoint sites and perform other tasks, such as creating and modifying Web pages and workflows for SharePoint sites.
- You do not know how to program and have little or no experience using SharePoint Designer.

Do Not Buy This Book

This book is NOT right for you if:

- You use Microsoft FrontPage 2003 to build or amend non-SharePoint sites.
- You're an instructor and use FrontPage 2003 to teach Web page authoring on non-SharePoint sites.
- You're looking for a general introduction to SharePoint.
- You do not have access to SharePoint 2010 in your organization, school, etc.
- You use SharePoint Designer 2007 to build sites based on Windows SharePoint Services 3.0 or Microsoft Office SharePoint Server 2007.
- You want to upgrade to SharePoint Designer 2010 to modify those sites.

Important SharePoint Designer 2010 connects only to SharePoint 2010 sites.

Introduction

Welcome to *Microsoft® SharePoint® Designer 2010 Step by Step*. SharePoint Designer 2010 is a free, powerful tool that together with Microsoft products such as Microsoft InfoPath 2010 Designer and Microsoft Visio 2010 plays a key role in building solutions with Microsoft SharePoint Foundation 2010 and Microsoft SharePoint Server 2010.

- SharePoint Foundation is a free download that provides a collection of services that you can use to build sites. It is also a platform on which you can build applications. SharePoint Server is such an application, and all the features in SharePoint Foundation are available to SharePoint Server. SharePoint Server comes in a number of editions, all of which you can use with SharePoint Designer.
- SharePoint Server 2010 is used for intranet scenarios, in which either the Enterprise or Standard client-access license edition can be used.
- SharePoint 2010 for Internet Sites is available in the Enterprise or Standard edition. These editions can be used to build extranet Web sites.
- FAST Search Server 2010 for SharePoint is used to design enterprise search solutions.
- Office 365 brings together the 2010 editions of SharePoint Online, Exchange Online, Lync Online, and Office desktop software as a cloud serivce.

Don't be put off by its name. SharePoint Designer is not aimed just at Web designers. Everyone who has had some training with SharePoint Designer should be able to use it, but it is not necessarily a tool that everyone should use. Some solutions you can develop quickly as no-code solutions; others may take time, and you might need to modify the underlying client-side code. For some users, the experimental and investigative aspects of developing a solution with SharePoint Designer might be new, frustrating, and initially unfriendly compared with tools they might be used to.

This book gives you a fundamental understanding of how SharePoint Designer works with the SharePoint platform. It helps you understand the consequences of performing tasks with SharePoint Designer and gives you the skills and understanding for how to best build and modify your solutions to meet your business requirements.

Your Companion eBook

The eBook edition of this book allows you to:

- Search the full text
- Print
- Copy and paste

To download your eBook, please see the instruction page at the back of this book.

Using the Practice Files

Before you can complete the exercises in this book, you need to copy the book's practice files to your computer. These practice files can be downloaded from the book's detail page, which is located at:

http://aka.ms/627338/files

By using the practice files, you won't waste time creating your own sample files and sites—instead, you can jump right in and concentrate on learning how to get the most out of SharePoint Designer 2010.

To complete the exercises, you need a copy of Microsoft SharePoint Designer 2010 installed on your computer and access to a SharePoint site. The SharePoint site can be created using Microsoft SharePoint Foundation 2010. However, to complete all the exercises, Microsoft SharePoint Server 2010 is required.

Tip **In many of the chapters, you will use the default SharePoint sites, lists, and libraries, so those chapters do not include any practice files. For other chapters, you need to use a site created from the solution file SPDSBSPracticeSite_Starter.wsp, which is the only solution file for this book. You need to create a site using this solution file only once. You can then use that site to complete all exercises for all chapters that require the solution file site. If you want to, you can also use the solution file site for exercises in other chapters, except for those exercises that require a publishing site.**

Important **You must have access to a working SharePoint site before using this book. SharePoint Foundation 2010 and SharePoint Designer 2010 can be downloaded from Microsoft's download Web site at no cost.**

What's on the Web?

The following table lists the practice files and site solution that are supplied on the book's Web site for each chapter.

Chapter	Files and WSP Files
Chapter 1, "Exploring SharePoint Designer"	None
Chapter 2, "Working with SharePoint Sites"	None

Chapter 3, "Working with Lists and Libraries"	WideWorldImportsSaleData.xlsx WideWorldImportersExpenses.docx b_NewAnn16x16.gif b_NewAnn32x32.png b_NewTask16x16.png
Chapter 4, "Creating and Modifying Web Pages"	SilverlightSPDSBS.xap
Chapter 5, "Working with Data Views"	Use solution file site SPDSBSPracticeSite_Starter.wsp sale.png SPDSBSC05.xsl.txt
Chapter 6, "Working with Data Sources"	Use solution file site SPDSBSPracticeSite_Starter.wsp Shipments.xml
Chapter 7, "Using Business Connectivity Services"	None
Chapter 8, "Understanding Workflows"	Use solution file site SPDSBSPracticeSite_Starter.wsp
Chapter 9, "Reusable Workflows and Workflow Forms"	WideWorldImporters.png
Chapter 10, "Branding SharePoint Sites"	bg.png Solution folder contains the resulting MyStyles.css and MyPage.aspx
Chapter 11, "Working with Master Pages"	Use solution file site SPDSBSPracticeSite_Starter.wsp
Chapter 12, "Understanding Usability and Accessibility"	Index.aspx
Chapter 13, "Managing Web Content in the SharePoint Server Environment"	None
Chapter 14, "Using Controls in Web Pages"	ADRotator.xml LucernePublishing.png WideWorldImporters.png ConsolidatedMessenger.png

Minimum System Requirements

This section details the requirements for both your computer—the client computer, where SharePoint Designer should be installed—and the requirements for a computer running SharePoint 2010—the server computer, where either SharePoint Foundation or SharePoint Server is installed. If you have access to an Internet service provider (ISP) that

hosts SharePoint for you or your company, or if your company has installed SharePoint on your corporate intranet, the details about the server requirements will be of little interest to you. Just ask your company for a SharePoint site that you can use while you are completing the exercises in this book, preferably a top-level site in your own site collection. If you currently have no access to a SharePoint site, the server computer requirements section that follows will help you create or get access to a SharePoint environment.

Tip You can install SharePoint Designer 2010 and SharePoint 2010 on the same computer. However, this not usual in a production environment.

Client Computer

To use this book, your client computer should meet the following requirements:

- **Processor** 500 MHz processor or higher.
- **Memory** 256 megabytes (MB) of RAM or higher.
- **Hard disk** For the eBooks and downloads, 3 GB of available hard disk space is recommended, with 2 GB on the hard disk where the operating system is installed.
- **Operating system** Windows 7, Windows Server 2003 R2, Windows Server 2008 R2, Windows Server 2008 with Service Pack 2, Windows Vista with Service Pack 1 or later, Windows XP with Service Pack 3.

  .NET Framework 3.5 SP1 must be installed on the client machine, which is incorporated in Windows 7 and Windows Server 2008 R2 but not in other operating systems.
- **Drive** CD or DVD drive.
- **Display** Monitor with 1024×768 or higher screen resolution and 16-bit or higher color depth. Use of graphics hardware acceleration requires DirectX 9.0c–compatible graphics card with 64 MB or higher of video memory.
- **Software** Windows Internet Explorer 7 or later, or one of the supported browsers and Microsoft Silverlight. See the article "Plan browser support (SharePoint Server 2010)" at *technet.microsoft.com/en-us/library/cc263526(office.14).aspx*.

Tip Actual requirements and product functionality might vary based on your system configuration and operating system.

Note SharePoint Designer 2010 connects only to SharePoint 2010. To connect to sites based on Office SharePoint Server 2007 or earlier versions, you must use SharePoint Designer 2007. If you install SharePoint Designer 2007 and SharePoint Designer 2010 side by side, you must download the 32-bit version of SharePoint Designer 2010. Also note that 64-bit Office applications will not run if SharePoint Designer 2007 is installed; 64-bit Office 2010 applications should be used only if you are not connecting to SharePoint 2007 servers.

Client Software

In addition to the hardware, software, and connections required to run SharePoint Designer, you need the following software to successfully complete the exercises in this book:

- SharePoint Designer 2010, which is available at no cost from the Microsoft Web site *office.microsoft.com/en-us/sharepointdesigner/*
- Microsoft Visio Premium 2010
- Microsoft InfoPath Designer 2010
- Microsoft Outlook 2010
- Microsoft Access 2010
- 20 MB of available hard disk space for the practice files

Server Computer

To use this book, you must have access to a server running Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010. Directions for how to install either of these products, especially for a production environment, is outside the scope of this book. However, if you do not have access to a SharePoint site and your company cannot provide you with one, you have two options:

- Download the 2010 Information Worker Hyper-V virtual machine that includes Office 2010, SharePoint Designer 2010, and SharePoint Server 2010 from Microsoft's download site (*www.microsoft.com/downloads*). Use the search keyword *2010 IW*.
- Create a temporary SharePoint environment by installing a copy of SharePoint on your computer.

Important **To create a permanent installation of either a SharePoint Server or a SharePoint Foundation environment, refer to one of the following sources of information: *Microsoft SharePoint Server 2010 Administrator's Companion*, by Bill English, Brian Alderman, and Mark Ferraz (Microsoft Press, 2011) or *Microsoft SharePoint 2010 Administrator's Pocket Consultant*, by Ben Curry (Microsoft Press, 2010). For online assistance, visit the SharePoint 2010 products site on Microsoft TechNet, which can be found at *technet.microsoft.com/en-us/library/ee428287(office.14).aspx*.**

An installation of SharePoint Foundation allows you to complete the majority of exercises in this book. Appendix C, on page 503, provides a brief set of instructions for installing SharePoint Foundation 2010 on a single server with a built-in database. This configuration can be used as a temporary SharePoint environment. The server computer should meet the following requirements:

- **Operating system** One of the following 64-bit operating systems: Windows Server 2008 R2, Windows Server 2008 R2 Enterprise, Windows Server 2008 R2 Standard, or Windows Server 2008 with Service Pack 2.
- **Processor** 64-bit; four-cores.
- **Memory** 8 GB for development or evaluation use.
- **Software** 80 GB for installation

See Also A full list of hardware and software requirements for SharePoint Foundation 2010 can be found at *technet.microsoft.com/en-us/library/cc288751(office.14).aspx*.

Tip A temporary installation of SharePoint Server 2010 on a single server with a built-in database will allow you to complete all but a very few of the exercises in this book, but you need to obtain access to a trial version of SharePoint Server or purchase a copy. More information can be found at *sharepoint.microsoft.com/Pages/Default.aspx*. The installation of SharePoint Server 2010 on a single server with a built-in database is similar to the installation of SharePoint Foundation 2010 on a single server with a built-in database. You can use the installation instructions in Appendix C as a guideline.

Using the Practice Files for the Exercises

While you work through the exercises in this book, you should have access to a SharePoint site, preferably a top-level site in your own site collection. You should be a site owner of this site. In the exercises, you create child sites below this site, and in Chapters 5, 6, 8, and 11, you use a starter solutions .wsp file to create the child site. Please refer to the instructions later in this section for how to create a practice site from the starter solutions .wsp file.

The solution file provided on the Web site contains lists, libraries, files, and pages that you use for the exercises. In chapters that require you to create a site based on the solutions file, a SET UP paragraph lists that requirement. The text also explains any preparations you need to take before you start working through the chapter, as shown here:

> **Practice Files** Before you can use the practice files in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the exercises in this chapter are in the Chapter08 practice file folder. A complete list of practice files is provided in "Using the Practice Files" at the beginning of this book.

SET UP Using SharePoint Designer, open the site you created from the SPDSBSPracticeSite_Starter.wsp practice file.

Other practice files might need to be uploaded to the Site Assets library. You can use the browser or SharePoint Designer to upload the files to the Site Assets library. To use SharePoint Designer, use the following steps:

1. In the **Navigation** pane, click **Site Assets**, and then on the ribbon, click **Import Files** in the **New** group. The Import dialog box opens.
2. Click **Add File** to display the **File Open** dialog box.
3. Browse to the folder that contains the practice file. Click **Open**, and then click **OK** to close the File Open and Import dialog boxes.

Uploading the Solution WSP File

To create a practice site for a chapter based on the solution .wsp file, you first need to upload the solution .wsp file to the Solutions gallery by following these steps:

SET UP Verify that you have sufficient rights to upload a solutions file to the Solutions gallery for the top-level site of the site collection you are using. Open the top-level SharePoint site in the browser.

1. Click **Site Actions**, and click **Site Settings** to display the site settings page.
2. Under **Galleries**, click **Solutions** to display the **Solutions** page.

   Note If you see a Go To Top Level Site Settings link under Site Collection Administration, you are not on the top-level site administration page. A site template can only be uploaded to the Solutions gallery on a top-level site. Click Go To Top Level Site Settings, and then repeat the previous step.

Upload Solution

3. On the ribbon, click the **Solutions** tab, and then click **Upload Solution** to display the **Solutions Gallery: Upload Solution** dialog box.
4. Click the **Browse** button to display the **Choose File to Upload** dialog box.
5. Navigate to the folder that contains the solution .wsp file, click **SPDSBSPracticeSite_Starter.wsp**, and then click the **Open** button.
6. Click **OK**.

   The Solutions Gallery—Activate Solution dialog box is displayed.
7. On the **View** tab, click **Activate** to redisplay the Solutions page.

Creating a Site from the Solution WSP File

After you have uploaded the solution .wsp file to the Solutions gallery, you can create a child site based on the solutions file.

SET UP In your browser, display the home page of the SharePoint site where you want to create the child site.

1. Click **Site Actions**, and then click **New Site**.

   In SharePoint Foundation, the New SharePoint Site page is displayed. In SharePoint Server, a Create page is displayed.

2. Complete the following step depending the version of SharePoint that is installed:

   a. On SharePoint Foundation, on the **Custom** tab of the **Select a template** list, select **SPD2010SBS_PracticeSite_Starter**.

   b. On SharePoint Server, in the left pane, under **Filter By**, click **Custom**, and then select **SPD2010SBS_PracticeSite_Starter**.

   Troubleshooting If you are using SharePoint Server and cannot see the Custom filter or the name of the template you uploaded, contact your site collection administrator. If you are the administrator for the site collection where you are trying to create this team site, follow the procedure in Appendix C on page 503 to display the template and then complete this exercise.

3. In the **Title** box, type a logical name for the new site—for example, **SPDSBS Practice Site**.

4. In the **URL name** box, type the same name you typed in the **Title** box.

5. Click **Create**.

   The home page of the new practice site is displayed.

CLEAN UP Close the browser.

Removing the Solution Files

To remove the solution .wsp file from the Solutions gallery, follow these steps:

SET UP Verify that you have sufficient rights to delete a solution from the Solutions gallery. Open the top-level SharePoint site where you previously uploaded the solution file.

1. Click **Site Actions**, and click **Site Settings** to display the site settings page.

2. Under **Galleries**, click **Solutions**.

Note If you see a Go To Top Level Site Settings link under Site Collection Administration, you are not on the top-level site administration page. A site template can only be stored in the Solutions gallery on a top level site. Click Go To Top Level Site Settings and then repeat the previous step.

3. Point to the site template you want to remove, click the arrow that appears, and then click **Deactivate**.

   The Solutions Gallery—Deactivate Solution dialog box appears.

4. On the **View** tab, click **Deactivate**.
5. Point to the site template you want to remove, click the arrow that appears, and then click **Delete**. You are prompted to confirm your request. Click **OK** to complete the deletion and display the Solutions gallery.
6. Repeat steps 3 through 5 to remove each site template that you no longer want to be available for creating practice sites.

CLEAN UP Close the browser.

Deleting a Practice Site

If you created a practice site that you no longer want, you can delete it. Follow these steps to delete a practice site:

SET UP Verify that you have sufficient rights to delete a site. In the browser, open the SharePoint site you want to delete.

1. On the **Site Actions** menu, click **Site Settings** to display the site settings page.
2. In the **Site Actions** section, click **Delete this site** to display the **Delete This Site** confirmation page.
3. Click the **Delete** button to delete the site.
4. On the **Delete This Site** warning page, click **Delete**.

CLEAN UP Close the browser.

Important Microsoft product support services do not provide support for this book or its practice files.

Getting Help

Every effort has been made to ensure the accuracy of this book. If you run into problems, please contact the sources listed in the following sections.

Getting Help with This Book

If your question or issue concerns the content of this book, please first consult the book's errata page, which can be accessed at:

http://aka.ms/627338/files

This page provides information about known errors and corrections to the book. If you do not find your answer on the errata page, send your question or comment to:

mspinput@microsoft.com

Getting Help with Microsoft SharePoint Designer

If your question is about SharePoint Designer and not about the content of this Microsoft Press book, please search the Microsoft Help and Support Center or the Microsoft Knowledge Base at:

support.microsoft.com

In the United States, Microsoft software product support issues not covered by the Microsoft Knowledge Base are addressed by Microsoft Product Support Services. The Microsoft software support options available from Microsoft Product Support Services are listed at:

www.microsoft.com/services/microsoftservices/srv_support.mspx

Outside the United States, for support information specific to your location, please refer to the Worldwide Support menu on the Microsoft Help And Support Web site for the site specific to your country:

support.microsoft.com/common/international.aspx

Features and Conventions of This Book

This book has been designed to lead you step by step through all the tasks you are most likely to want to perform in Microsoft SharePoint Designer 2010. Each chapter of this book includes self-contained topics that teach you about specific program features. Most topics conclude with a step-by-step exercise in which you practice using the program. The following features of this book will help you locate specific information:

- **Detailed table of contents** Scan this list of the topics and sidebars within each chapter.
- **Chapter thumb tabs** Easily locate the beginning of each chapter by looking at the colored blocks on the odd-numbered pages.
- **Topic-specific running heads** Within a chapter, quickly locate the topic you want by looking at the running head on odd-numbered pages.
- **Glossary** Look up the meaning of a word or the definition of a concept.
- **Detailed index** Look up specific tasks and features and general concepts in the index, which has been carefully crafted with the reader in mind.

You can save time when you use this book by understanding how the *Step by Step* series shows special instructions, keys to press, buttons to click, and other information. These conventions are listed in the following table.

Convention	Meaning
SET UP	This paragraph precedes a step-by-step exercise and indicates the practice files that you will use when working through the exercise. It also indicates any requirements you should attend to or actions you should take before beginning the exercise.
CLEAN UP	This paragraph follows a step-by-step exercise and provides instructions for saving and closing open files or programs before you move on to another topic. It also suggests ways to reverse any changes you made to your computer while working through the exercise.
1 2	Numbered steps guide you through hands-on exercises in each topic, as well as procedures in sidebars and expository text.
See Also	This paragraph directs you to more information about a given topic in this book or elsewhere.

Troubleshooting	This paragraph alerts you to a common problem and provides guidance for fixing it.
Tip	This paragraph provides a helpful hint or shortcut that makes working through a task easier or information about other available options.
Important	This paragraph points out information that you need to know to complete a procedure.
Keyboard shortcut	This paragraph provides information about an available keyboard shortcut for the preceding task.
Ctrl+**Tab**	A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, "Press **Ctrl**+**Tab**" means "hold down the **Ctrl** key while you press the **Tab** key.
Bold	In exercises that begin with SET UP information, bold type displays text that you should type; the names of program elements, such as buttons, commands, windows, and dialog boxes; and files, folders, or text that you interact with in the steps.

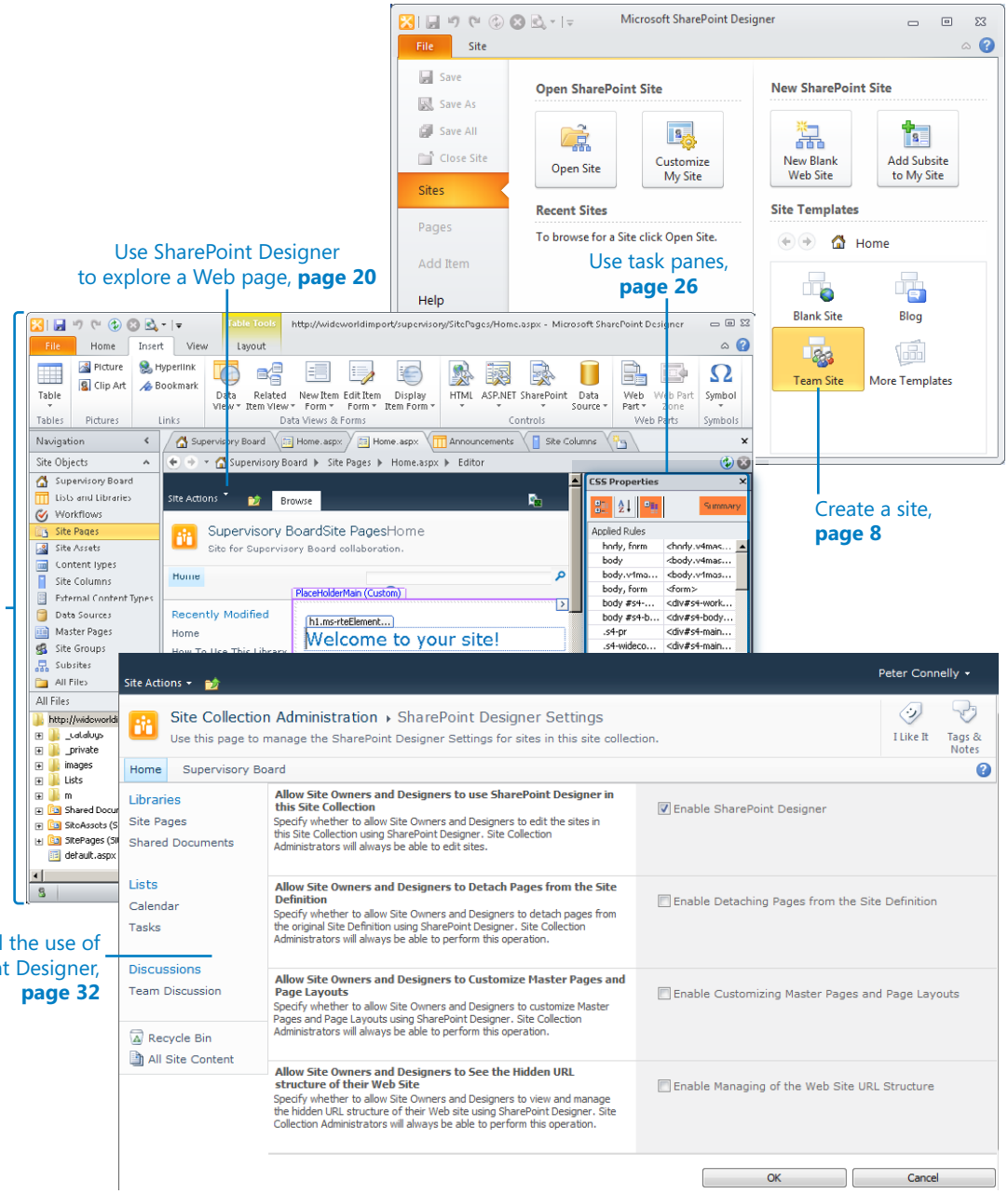
Part 1

Getting Started with Microsoft SharePoint Designer 2010

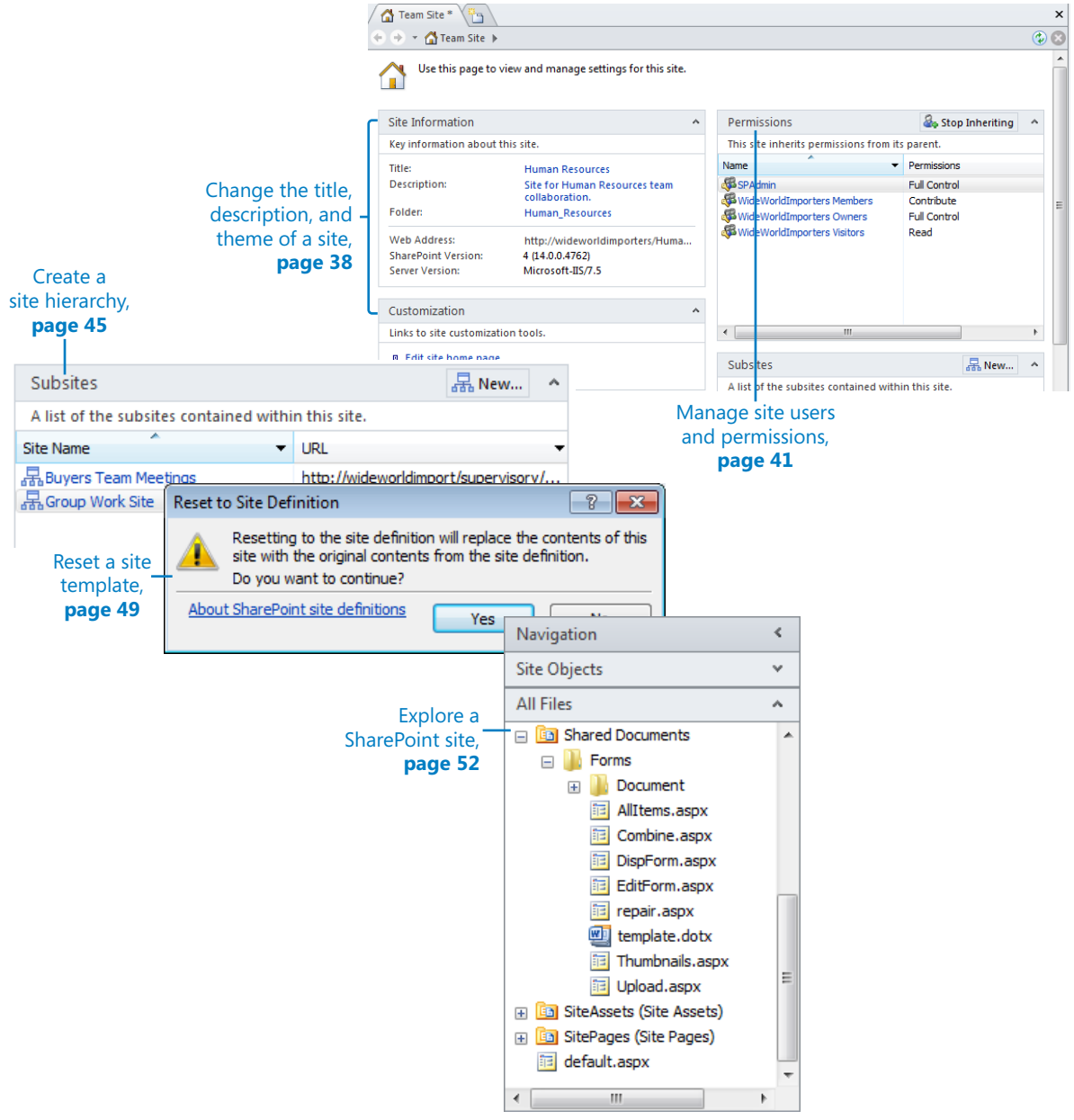
1 Exploring SharePoint Designer 2010 1

2 Working with SharePoint Sites 37

Chapter at a Glance



Chapter at a Glance



2 Working with SharePoint Sites

In this chapter, you will learn how to

- ✔ Change the title, description, and theme of a site.
- ✔ Manage site users and permissions.
- ✔ Create a site hierarchy.
- ✔ Delete a SharePoint site.
- ✔ Reset a site template.
- ✔ Explore a SharePoint site.
- ✔ Navigate a site's components.
- ✔ Save and use a site template.

You might be using SharePoint for your Internet, intranet, or extranet Web sites, which are built from a series of SharePoint sites. It is within these sites that you create, store, and manage your content and collaborate with other users in your enterprise. Each site can have its own security settings, functionality, content, and navigation. As you saw in Chapter 1, "Exploring SharePoint Designer 2010," these sites can be children of other sites and can have subsites underneath them. This hierarchal relationship can assist you with navigation as well as security inheritance.

In this chapter, you will see how to use Microsoft SharePoint Designer 2010 to modify a site's title, description, and theme. You will also learn how to manage who has access to a site and what they can do on the site, as well as how to manage your site hierarchy. You will learn how to make a copy of your customizations by creating a site template and how to reset your site's pages when users have customized them with SharePoint Designer so that they reflect the site template . You will explore the hidden URL structure of your Web site and review other site components, such as site columns and content types. Your work with site columns and content types leads nicely to Chapter 3, "Working with Lists and Libraries," where you use site columns and content types with lists and libraries.

Practice Files No practice files are required to complete the exercises in this chapter. For more information about practice files, see "Using the Practice Files" on page xxiii.

Changing the Title, Description, and Theme of a Site

Each site has a title and description. These are important properties of a site because they appear on each page within a site and communicate to users the purpose and function of the site. They are also fundamental to making information easy to find.

SharePoint uses the text in the title and description fields to rank content items that are returned in a search result set. Users of SharePoint Server sites can create a more focused result set by using the advanced search page on the Enterprise Search site, where title and description are some of the ***metadata*** properties that can be selected in the property restrict list. On SharePoint Foundation sites, where there is no enterprise search, a user can, for example, type *description:oak* in the Search box to find all SharePoint components whose description property contains the word *oak*. As a site or content owner, it is important that you enter meaningful and consistent names for your site and other SharePoint components.

See Also More information on how to execute basic search queries on a SharePoint site can be found in Chapter 16, "Finding Information on the SharePoint Site," in *Microsoft SharePoint Foundation 2010 Step by Step* by Olga Londer and Penelope Coventry (Microsoft Press, 2011).

Site owners of collaboration and team sites will want to apply their own unique look and feel. Themes provide lightweight branding of a SharePoint site. Site owners can apply one of 20 out-of-the-box themes to a site. Themes reuse the theme definition and format defined in the Office Open XML standard that was introduced with Microsoft Office PowerPoint 2007 to create new themes for slide decks. No developer resource is needed; once the .thmx file is created using an Office 2010 application, it can be loaded into the Theme gallery at the top-level site of a site collection.

See Also To find how to create a theme using Office PowerPoint 2010, see, Chapter 3, "Creating and Managing Sites," in *Microsoft SharePoint Foundation 2010 Step by Step*. More information on how to plan for themes can be found at *http://technet.microsoft.com/en-us/library/ee424399.aspx*.

Using a browser on a SharePoint Server publishing site or on a site where the Publishing feature is enabled, you can create your own new themes and push them down to subsites or inherit a theme from the parent site. However, you can apply a theme to only

one site by using the browser on SharePoint Foundation sites, on SharePoint Server sites that do not have the Publishing feature enabled, or when you use SharePoint Designer.

Note Themes change the colors and fonts used on a site. If you want to change other design elements, such as font size or spacing, you need to use cascading style sheets. If you want to completely change the page structure and design of your site, you need to modify or create your own master pages.

In this exercise, you modify a site's title and description and apply a theme to the site.

SET UP Using SharePoint Designer, open the team site you created and modified in Chapter 1. The settings page should be displayed in the workspace. If you did not yet create a team site, follow the steps in Chapter 1 before you start this exercise.

1. On the **Site** tab, click **Rename** in the **Edit** group.

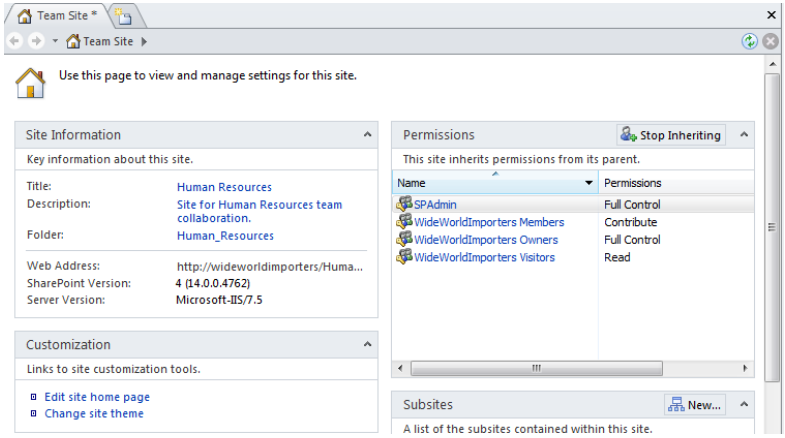
   In the Site Information area, a box appears to the right of Title, with the site name highlighted.

2. Type **Human Resources,** and then press **Enter**.

   An asterisk appears on the Team Site tab, indicating that the properties of the site have changed but you have not saved your changes.

3. To the right of **Description**, click **<click to enter text>,** and then type **Site for Human Resources team collaboration**.

   Tip You can modify the URL of your site by clicking the text to the right of Folder, unless the site is the top-level site of a site collection. If that is the case the URL of the site cannot be modified and the Folder option is not displayed in the Site Information area.



4. On the Quick Access Tool bar, click **Save**.

   The site settings page is refreshed, and the tab label changes to *Human Resources* with no asterisk. In the Navigation pane, the site object is labeled *Human Resources*, as is the ScreenTip that appears when you hover the mouse over the site name.

5. In the **Customization** area of the site settings page, click **Change site theme**. If prompted, type your user name and password, and then click **OK**.

   A browser window opens and displays the Site Theme page.

6. In the **Select a Theme** section, click **Azure,** and then click **Apply**.

   The Processing page is momentarily displayed before the site settings page is displayed, with the Azure theme applied.

   Troubleshooting Cascading style sheets used on SharePoint sites can be created so that they do not support themes. This often occurs on company portal sites or an Internet site where a company wants to maintain its brand on all sites within a site collection. If the theme you choose in this exercise is not applied, check with your SharePoint administrator.

7. Under **Look and Feel**, click **Site theme**.

   The Site Theme page is displayed.

8. In the **Select a Theme** section, click **Default (no theme),** and then click **Apply**.

   The site settings page is displayed, with no theme applied.

CLEAN UP Close the browser, but leave SharePoint Designer open if you are continuing to the next exercise.

Publishing Features

Publishing functionality is enabled on SharePoint Server sites when the SharePoint Server Publishing feature is activated. A ***feature*** is a concept introduced in Windows SharePoint Services 3.0 that allows you to activate or deactivate functionality at the level of a site, site collection, Web application, or ***SharePoint farm***. The SharePoint Server Publishing feature depends on the activation of the SharePoint Server Publishing Infrastructure feature at the site-collection level. Microsoft developed both these features, which are installed when SharePoint Server 2010 is installed on each Web front end. Site owners can activate features to extend the functionality of their sites. Therefore, you can turn a SharePoint site based on the Team Site template into a publishing site by activating the SharePoint Server Publishing feature.

Managing Site Users and Permissions

SharePoint Designer provides you with more than just the ability to customize a SharePoint Foundation or SharePoint Server site. It also helps you manage and protect your sites without the need to open the browser. When you create a site in the browser, you can choose whether the site has its own security setting. However, when you create a site with SharePoint Designer, your site automatically has the same security settings as the parent site. If you are customizing a new site to meet a specific business need, or if you want to templatize your site so that you can create many other sites based on your customizations, you do not want other users to use your site until your customizations are complete and tested. In this case, you need to alter the default security settings of your site.

SharePoint permission rights, such as Manage Lists, Create Subsites, Apply Themes and Borders, and Delete Items, are grouped into permissions levels. On a specific SharePoint object, such as a site, a list, or a list item, you map a permissions level to a user or to a SharePoint group.

SharePoint Foundation has five permission levels: Full Control, Design, Contribute, Read, Limited Access, and View Only. SharePoint Server has an additional three permission levels: Manage Hierarchy, Approve, and Restricted Read. In SharePoint Designer you cannot create a permission level or change the level of a permission rights group. However, you can create and manage SharePoint groups, and you can map users and SharePoint groups to permission levels for sites, lists, and libraries. To map permission levels to list items or individual files, you need to use the browser.

See Also For more information on permissions and permission levels, see Chapter 3 and the appendix in *Microsoft SharePoint Foundation 2010 Step by Step*.

In this exercise, you change the security settings for a subsite from inheriting permissions from its parent site to using unique permissions. You also prevent the Viewers site group from accessing the site and then grant a user, such as Todd, access to the site so that he can add and modify content. You then test whether that user can use SharePoint Designer to open the site.

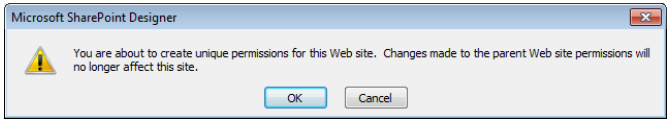
Important To complete this exercise, you need access to the credentials of another user account and a team site that is inheriting its permissions from its parent site.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open. The settings page for the site should be displayed.

Stop Inheriting

1. In the **Permissions** area of the workspace, click **Stop Inheriting**.

   A Microsoft SharePoint Designer dialog box opens.



2. Click **OK** to confirm the change.

   The dialog box closes. In the Permissions area, the Stop Inheriting button is replaced by New. A list of the SharePoint groups and users is copied from the parent site and mapped to the same permission levels as on the parent site.

   Note The Permissions column in the Permissions area references permission levels.

3. Click the icon to the left of **Viewers** to activate the **Site Permissions** tab on the ribbon, and then click **Delete** in the **Edit** group.

4. Click **OK** to confirm the change.

   The Viewers SharePoint group is not listed under Permissions.

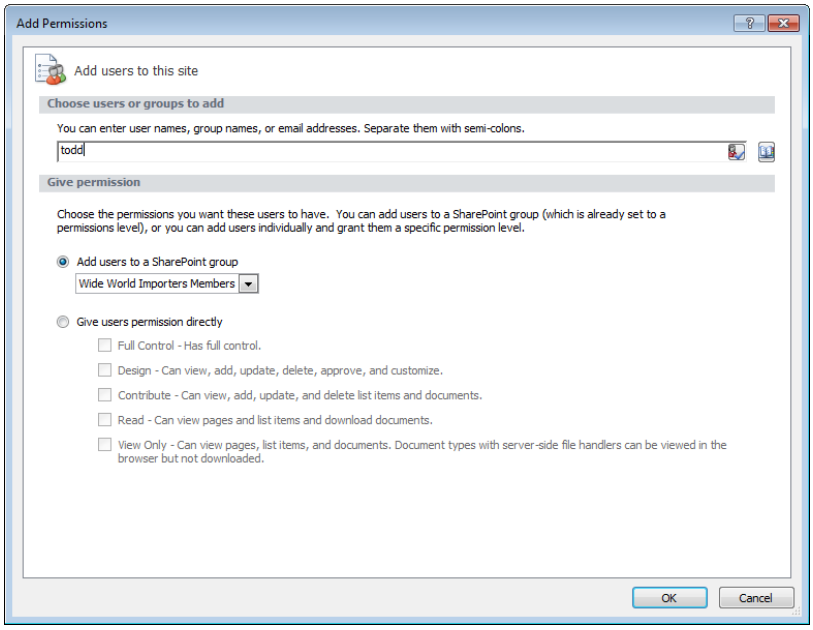
5. In the Permission area, take note of the site group that is mapped to the **Contribute** permission level, and then click **New**.

   The Add Permissions dialog box opens.

6. In the **Choose users or groups to add** text box, type the user name or e-mail address of the user to whom you'd like to grant permissions, such as **todd**.

   Tip You can use the Check Names or the People Picker icon to ensure you enter a valid user name.

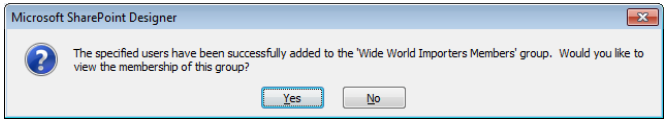
7. Under **Add users to a SharePoint group**, click the group you noted earlier that was mapped to the Contribute permission, such as **Wide World Importers Members**.



Important Editing a site group affects the membership of all sites, lists, folders, and items that are using that site group.

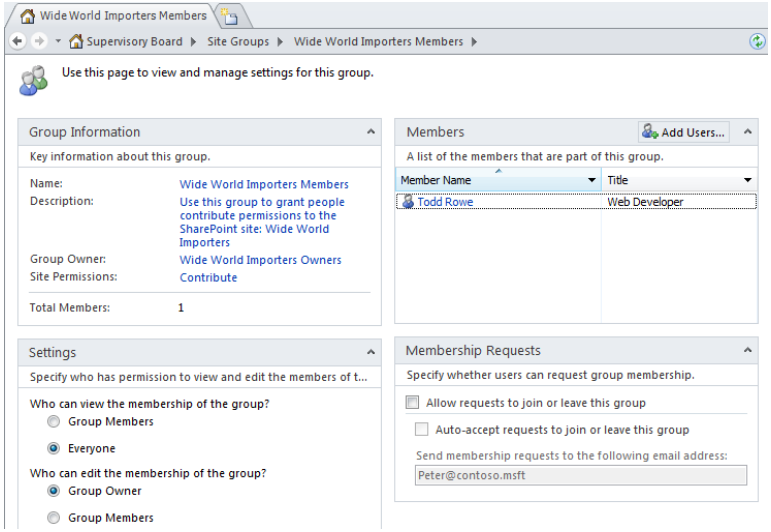
8. Click **OK** to close the **Add Permissions** dialog box.

   A Microsoft SharePoint Designer dialog box opens.



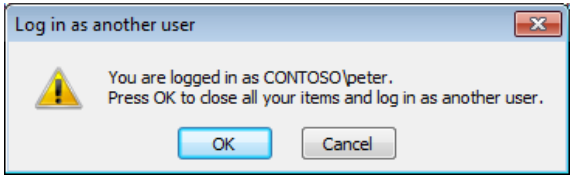
9. Click **Yes** to view the membership of the group.

   A new workspace tab opens and displays the settings page of the site group you added the user to. In the Members area is a list of all users who are a member of this site group, including the user you added in this exercise.



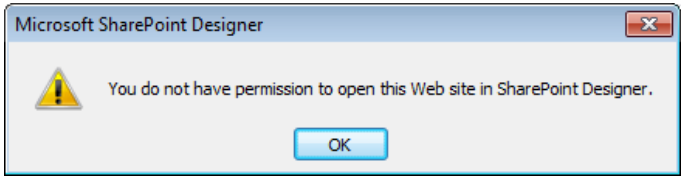
Log In As

10. Click the **Log In As** button in the status bar in the SharePoint Designer window.
11. Click **OK** in the **Log in as another user** dialog box that opens.



12. In the **Windows Security** dialog box that opens, type the user name and password of the user you granted permissions to earlier in this exercise, and then click **OK**.

    A Microsoft SharePoint Designer dialog box opens stating that you do not have permission to open this Web site in SharePoint Designer.



Important SharePoint permissions are used when you access SharePoint resources in SharePoint Designer. If your user name is mapped to the Contribute permission level at the site level, you cannot open the site in SharePoint Designer. Your user name must be mapped to the Design or Full Control permission levels to use SharePoint Designer. See the section "Controlling the Use of SharePoint Designer," in Chapter 1.

13. Click **OK**.

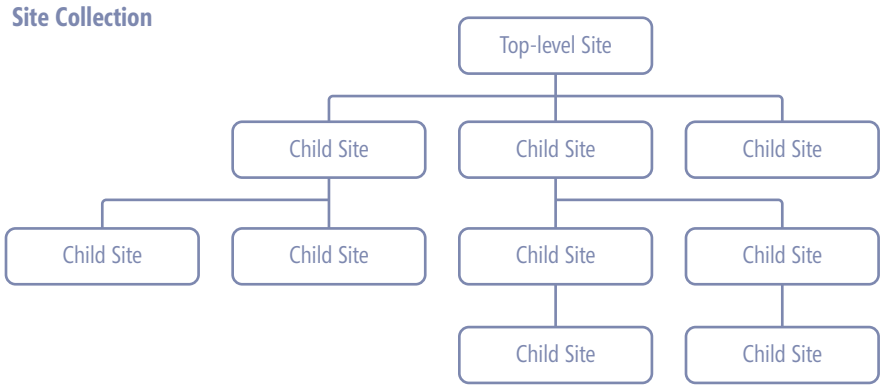
    Backstage view is displayed.

CLEAN UP Close SharePoint Designer.

Creating a Site Hierarchy

A site collection consists of one or more sites. Each site is created by using as a template a site definition or a customized site definition, both of which are commonly known as *site templates*. A site collection can be created by using the browser or programmatically. You cannot use SharePoint Designer to create a site collection. You can use SharePoint Designer only to create child sites within a site collection.

See Also For a list of steps that a SharePoint administrator can use to create a site collection, see Appendix C on page 503 and refer to *Microsoft SharePoint Server 2010 Administrator's Companion*, by Bill English, Brian Alderman, and Mark Ferraz (Microsoft Press, 2011).



Tip The Site Content and Structure page provides a visual representation of a site collection's hierarchy. The Site Content and Structure page is available only on SharePoint sites created on SharePoint Server when the SharePoint Server Publishing Infrastructure site collection feature and the SharePoint Server Publishing site feature are activated.

Typically, in a site collection that will host a number of collaboration SharePoint sites such as blogs, document workspaces, and meeting workspaces, the top-level site of the site collection is based on the Team Site template. This top-level site could be the focal site for an entire team or department. The team or department members might have only read access to this top-level site, with a limited number of them who contribute content to the site, and one or two who act as site collection owners. As child sites are created, the number of team members who have access to the site decreases, and the proportion of members who can create and update content increases.

The first task in developing a SharePoint-based solution when you use SharePoint Designer is to create a subsite. The only information you need is the URL, also known as the *internal name*.

Tip Use the best practices specified in the sidebar "Best Practices for Naming URLs" in Chapter 1 when you specify the URL name.

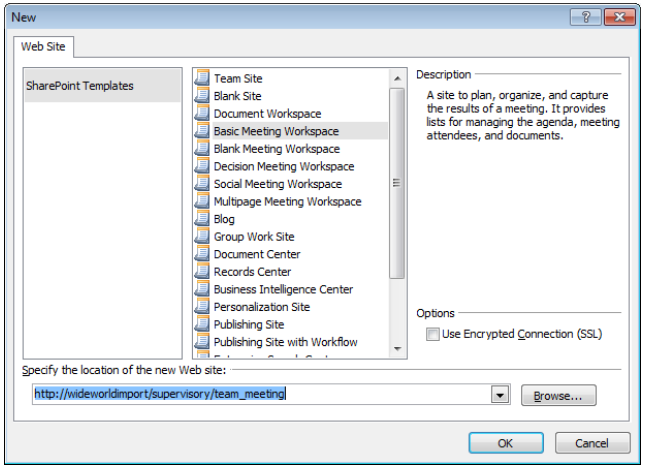
In Chapter 1 you created a subsite by using Backstage view. In this exercise, you will create two SharePoint sites, one by using the ribbon and the other by using the New button on the site's settings page.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise. The settings page for the site should be displayed.

1. On the **Site** tab on the ribbon, click **Subsite**.

   The New dialog box opens. In the Specify The Location Of The New Web Site text box, Subsite is highlighted. SharePoint Designer communicates with the SharePoint site collection and retrieves a list of SharePoint site templates that you can use as a basis for your new child site. These are displayed in the central pane of the New dialog box, also known as the *site type list*. Which templates are listed depends on whether you are using SharePoint Foundation or SharePoint Server, or whether your organization has created any site templates. If you connect to another SharePoint site, you might see different SharePoint templates.

2. Type **team_meeting** over Subsite. In the central pane, click **Basic Meeting Workspace**.



3. Click **OK**.

   Warning After you use a site template to create a site, you cannot change the site template the site is based on. If the functionality you require is not exposed through a SharePoint feature and you choose the wrong site template, you must delete the site and create it again.

   The new site opens in a new SharePoint Designer window.

4. In the **Site Information** area of the workspace, click **Basic Meeting Workspace** to the right of **Title,** and type **Buyers Team Meetings**.

   Tip When you create a site, the site's title is taken from the name of the site template. To avoid confusion about which site you are modifying, always change the title of the site as the first task after you create the site.

5. Click **<click to enter text>** to the right of **Description,** and type **Site for monthly team meeting details**.

   An asterisk appears on the site's workspace tab, indicating that some site information has changed but that you have not saved your changes.

Save

6. On the Quick Access Toolbar, click **Save**.

   The asterisk on the workspace tab disappears.

7. Click the **File** tab.

   Backstage view is displayed.

8. In the left pane, click **Close Site,** and then click **Exit.**

   The SharePoint Designer window displaying the Buyers Team Meeting site closes.

   Tip Each site you open in SharePoint Designer is displayed in its own SharePoint Designer window. With multiple SharePoint Designer windows open, it is very easy to modify a site you weren't planning to change. Try to have only one SharePoint Designer window open at a time.

9. Switch to the SharePoint Designer window displaying the team site setting page in the workspace. Notice that the Buyers Team Meeting site is listed in the **Subsites** area.

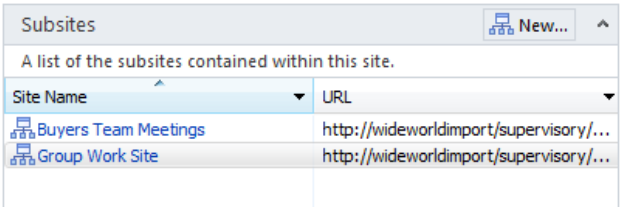
10. In the **Subsites** area, click **New**.

    The New dialog box opens. In the Specify The Location Of The New Web Site text box, Subsite is highlighted.

11. Type GroupWork over **subsite**. In the central pane, click **Group Work Site,** and then click **OK**.

    The new site opens in a new SharePoint Designer window.

12. Close the newly opened SharePoint Designer window, and switch to the SharePoint Designer window showing the team site setting page in the workspace. Notice that the **Subsites** area lists the two newly created subsites.



CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise.

Deleting a SharePoint Site

If you no longer need or want a site, you can delete it. Be warned, however. When you delete a site, it is not sent to the *Recycle Bin*. As you saw earlier in this chapter, when you create a site using SharePoint Designer, the title of the site reflects the name of site template used to create the site. You could end up with many sites named Team Site, for example, and only by looking at each site's URL can you see which site is which. Always verify that you are deleting the correct site.

In this exercise, you delete the two SharePoint sites you created in the previous exercise. To complete this exercise, you must have completed the previous exercise or have other sites you want to delete.

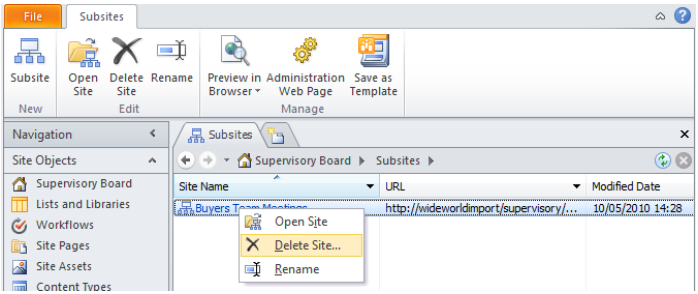
SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open. The settings page for the site should be displayed.

1. In the **Subsites** area of the workspace, click the icon to the left of **Group Work Site** to activate the **Site Subsites** tab on the ribbon.
2. On the ribbon, click **Delete Site** in the **Edit** group.
3. Click **OK** to confirm the deletion.
4. If a new SharePoint Designer window opens, close it and return to the SharePoint Designer window where the team site is open.
5. In the **Navigation** pane, click **Subsites**.

   The Subsites gallery page is displayed in the workspace.

Delete Site

6. Right-click **Buyers Team Meeting,** and click **Delete Site**.



7. Click **OK** to confirm the deletion.

   The Buyers Team Meeting site is no longer listed on the Subsites gallery page.

CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise. Close any open Web pages.

Resetting a Site Template

As I described in Chapter 1, when you create a site based on one of the default site templates, you do not create and save any pages in the SQL Server content databases. The content databases contain only pointers to the site definition files on the Web server. These site definition pages are known as *uncustomized pages*. When you use SharePoint Designer to edit an uncustomized page in advanced edit mode, a copy of the site definition file is stored in the SQL Server content database, where your customizations can be retained.

Any customized page can be reset to the uncustomized site definition file. You can reset all customized files within a site to point to the files in the site templates defined on the Web server, or you can reset just one customized file. Resetting a customized page to the site template restores the page to its original condition. Any customizations you made with SharePoint Designer in advanced edit mode are discarded, except for customizations made to content in the PlaceHolderMain region of a wiki page or to Web Parts that are placed inside a Web Part zone in a Web Part page (as long as the Web Part zone was defined in the original site definition page).

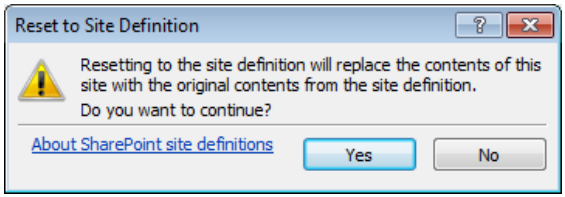
For example, on the Home.aspx page of a team site, if you insert an image and a Content Editor Web Part (CEWP) in the PlaceHolderMain region and then reset the page, any changes you made outside the PlaceHolderMain region are discarded, but the image and the Content Editor Web Part remain, along with any customizations you made to that Web Part.

In this exercise, you reset a site definition.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open. The settings page for the site should be displayed.

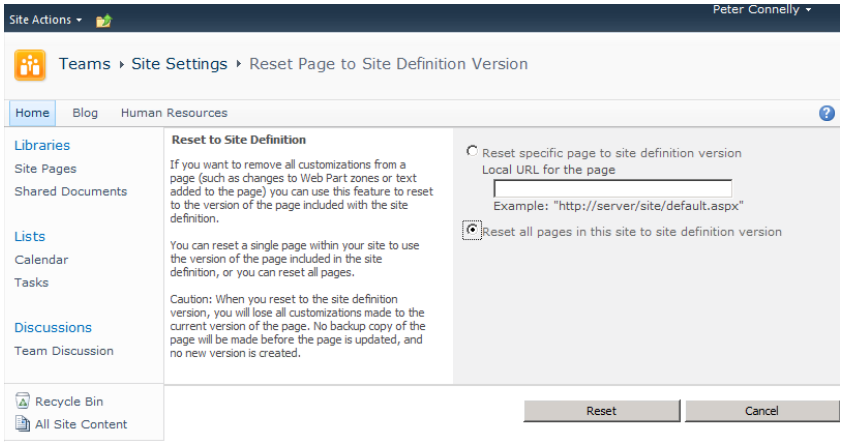
1. On the **Site** tab, click **Reset to Template** in the **Actions** group.

   The Reset To Site Definition dialog box is displayed.



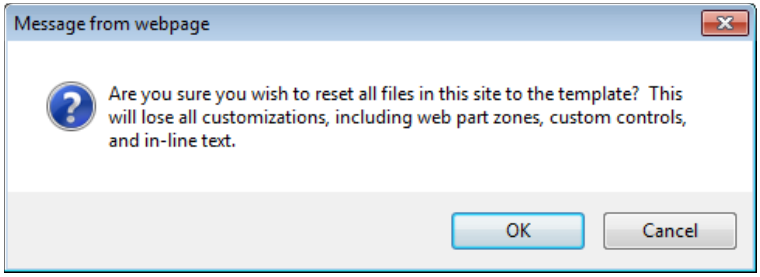
2. Click **Yes**.

   The Reset To Site Definition dialog box closes. A browser window opens. If prompted, type your user name and password, and then click OK. The Reset Page To Site Definition Version page is displayed.



3. Select **Reset all pages in this site to site definition version,** and then click **Reset**.

   A Message From Webpage dialog box opens.



4. Click **OK**.

CLEAN UP Close the browser. Leave SharePoint Designer open if you are continuing to the next exercise.

Complications of Upgrading Customized SharePoint Sites

Upgrading from the previous version of SharePoint to SharePoint 2010 is not a trivial task, and the upgrade process needs to be planned and tested carefully. If you are a site owner or a solutions creator of a Windows SharePoint Services 3.0 or Microsoft Office SharePoint Server 2007 site, you might be involved in this process. The IT department will upgrade the content so that your site runs on SharePoint Foundation 2010 or SharePoint Server 2010. However, as the owner of the site, you might have to decide on when to upgrade to the new look and feel and to other customizations you or the previous owner of the site implemented.

As previously noted, SharePoint sites are different from other sites because they use site templates during the site creation process, and these site templates point to site definition files on the Web server. Customizing these site definition files was easier with SharePoint Designer 2007. During the upgrade process, when Microsoft modifies its site definitions on the Web server to include new functionality, you might not see the new functionality, depending on the pages you customized. For example, the ribbon is implemented as a control on the master page; therefore, if you customized your site's master page, the ribbon will not be available to you. Other customizations can also affect the upgrade process, so during the upgrade planning process you need to identify any customizations on your SharePoint sites and test to see the effect the upgrade process might have on them.

If you are involved in the upgrade process, you can do one of the following with your customized pages after your site is upgraded to SharePoint 2010:

- Leave the customized page as a customized page. If the customized page is a master page, pages associated with that master page will always look like a Windows SharePoint Services 3.0 or SharePoint Server 2007 page.
- Reset the customized page to the now-upgraded site definition files or pages stored on the server file system. You lose all the customizations you made to your page, and you can decide whether to reapply that customization by using SharePoint Designer 2010. This process can involve a great deal of time and effort. For example, if customizing a page takes 15 minutes and you have 100 pages, you need to allow 25 hours to customize these pages.

See Also For more information on how to handle customizations, refer to *http://technet.microsoft.com/en-us/library/cc263203(office.14).aspx*.

Exploring a SharePoint Site

There is no one interface for SharePoint technologies; instead, you can access a SharePoint site by using a Web browser or compatible programs such as Office applications, including SharePoint Designer. You can choose the interface that suits the task you have to complete. However, depending on the program you choose, you might have a different view of the SharePoint site. If you use Microsoft Word, you see only a small portion of the Web site and its content. If you use a Web browser, you see the lists and libraries that support the collaborative nature of SharePoint, together with their content. When you use SharePoint Designer—the product that understands the most about the SharePoint infrastructure—you can see site lists and libraries that you would not see otherwise; however, you will see files but not their associated metadata, and you will not see list items.

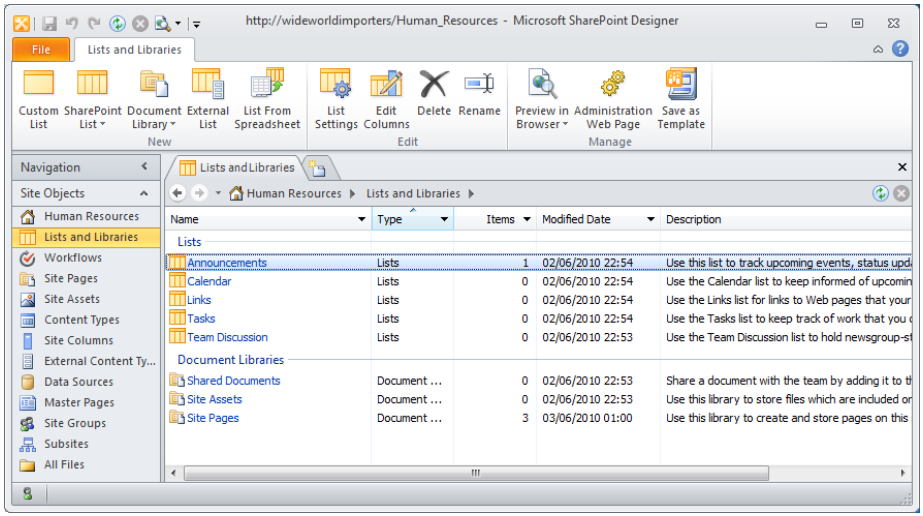
In this exercise, you use SharePoint Designer to explore a SharePoint site.

Important To complete this exercise, you must be a site collection administrator or a site owner or designer with permissions to see the hidden URL structure of your site. See "Controlling the Use of SharePoint Designer," in Chapter 1.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open. The settings page for the site should be displayed.

1. In the **Navigation** pane, click **Lists and Libraries**.

   The workspace displays the gallery page displaying each list or library for your site, and the workspace tab is labeled *Lists And Libraries*. The Lists And Libraries tab on the ribbon contains commands to create new lists and libraries and to edit the list.



Always Show pin

2. In the **Navigation** pane, hover over **All Files,** and click the Always Show pin that appears.

In the Navigation pane, the pin remains permanently visible to the right of All Files. The mini-gallery appears below the Navigation pane and displays the hidden URL content of the Web site, such as subsites (if they exist), folders, lists, libraries, and files. The icon that represents files depends on their extension.

Special folders are listed, such as *_catalogs*, *_private*, *images*, and *Lists*. The *_catalog* folder contains libraries such as those used to store Web Parts, Web site and list templates, as well as master pages.

SharePoint has a number of other folders that start with an underscore, such as *_layouts* and *_vti*, that contain images and Web pages that you can reference as links.

Warning Do not create folders for your private use with the name _layouts or _wpresources or any name that begins with _vti.

3. In the mini-gallery, click the **+** sign to the left of **Lists**.

The Lists folder expands, and a SharePoint-specific subfolder appears for each list created for your Web site.

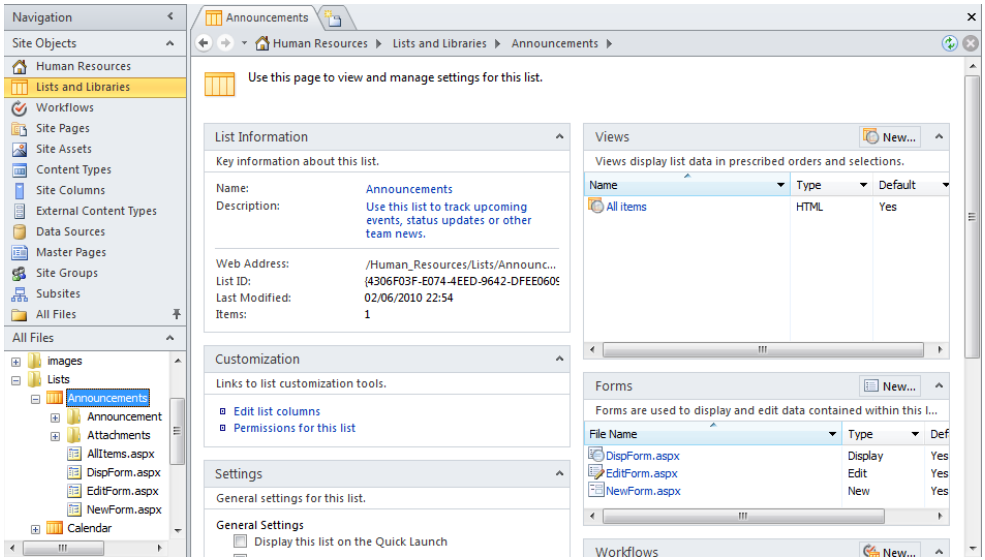
4. In the mini-gallery, under the **Lists** top-level folder, click the **+** sign to the left of **Announcements**.

The Announcements list expands, exposing an Attachments subfolder (if attachments are enabled) and a number of Web pages that correspond to views created for the list and forms used to insert, edit, and display the properties of a list item.

5. In the workspace, in the **Lists and Libraries** gallery, under **Lists**, click **Announcements**.

The workspace tab is now labeled *Announcements*, and the workspace contains the settings page for the Announcements list. The workspace displays more information for the Announcements list than is displayed in the mini-gallery. It contains key information such as the list name and description and the number of Announcements list items. It also shows whether you can customize the list by editing the columns or modifying the permissions of the list and shows views and forms to insert, edit, and display the properties of a list item. The List Settings tab on the ribbon contains commands to create new list objects and to manage the list.

Troubleshooting The settings page for the Announcements list is displayed only if you click Announcements in the Lists And Libraries gallery page in the workspace. The settings page is not displayed if you click Announcements in the mini-gallery.



Back Arrow

6. In the breadcrumb above the workspace, click the Back arrow.

The gallery page for lists and libraries is displayed.

7. In the workspace, under **Document Libraries,** click **Shared Documents**.

The workspace tab is labeled *Shared Documents*, and the workspace now contains the settings page for Shared Documents, which is similar to the settings page for the Announcements list. As with lists, you cannot see the metadata for documents loaded into this document library. You must use the browser to see the metadata associated with the documents.

Collapse Group

8. In the **Navigation** pane, click the up arrow to the right of **Site Objects** so that the mini-gallery is displayed the full length of the **Navigation** pane. Then click the **–** sign to the left of **Announcements**.

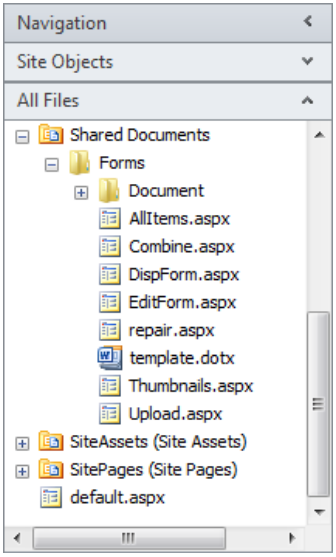
   The Announcements list collapses.

9. In the mini-gallery, click the **+** sign to the left of **Shared Documents**.

   The Shared Documents top-level folder expands and exposes a subfolder named Forms and all the documents that users have uploaded to the library. (If this is a newly created team site, no documents are listed.)

10. In the mini-gallery, click the **+** sign to the left of **Forms**.

    The Forms folder expands, exposing Web pages that correspond to views created for this library and forms to manipulate metadata and upload documents. A file named template.dotx is listed in the Forms folder. This file is used when you click New Document on the Document tab in the Web browser.



Hide pin

11. In the **Navigation** pane, click the down arrow to the right of **Site Objects**, and then click the Hide pin to the right of **All Files**.

    The mini-gallery closes.

CLEAN UP Close SharePoint Designer.

Navigating a Site's Components

In the previous version of SharePoint Designer, the main object that you could customize and manage was a file. In SharePoint Designer 2010, you can manage other SharePoint objects, such as site columns, content types, external content types, and workflows. Content types and site columns are the building block of all the default lists and libraries.

Site columns introduce the concept of global column definitions. SharePoint Foundation, and therefore SharePoint Server, come with a set of default site columns that SharePoint installs when you create a site collection. These site columns are then grouped into content types that share common properties and can be used to standardize the metadata properties and use of business information across a number of lists and libraries.

Content types can include not only a group of site columns but also information policies, workflows, and the configuration of the document information panel (DIP) settings. The default content types defined at the root level of a site collection are used to create all the default lists and libraries. For example, the Document content type is used to create the Shared Documents library you find in a team site. The Document content type is based on the Item content type, which defines the Title column. In turn, the Item content type is based on the System content type, which is at the top of the content type hierarchy. Content types and site columns can be defined at the site-collection level and at the site level.

Note The SharePoint Server Managed Metadata Service (MMS) allows you to share a term store, and optionally content types, across site collections and Web applications. More information on MMS can be found at *http://technet.microsoft.com/en-us/library/ee424402(office.14).aspx*.

External content types define data that is stored in external systems. Using SharePoint Designer to work with external content types and workflows is detailed in Chapter 7, "Using Business Connectivity Services", Chapter 8, "Understanding Workflows," and Chapter 9, "Using Reusable Workflows and Workflows Forms," later in this book.

In this exercise, you use SharePoint Designer to navigate to site components.

SET UP Using SharePoint Designer, open the root site of a site collection.

1. In the **Navigation** pane, click **Content Types**.

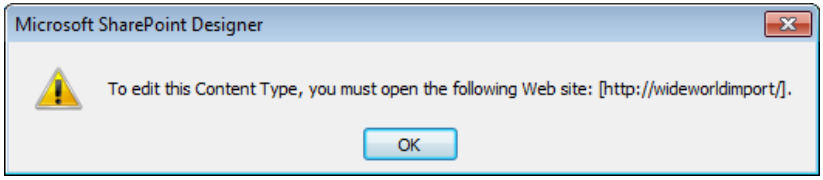
   A new workspace page opens with a tab labeled Content Types and displays the gallery page for content types.

2. In the workspace, click the down arrow in the **Group** column heading, and then click **Document Content Types**.

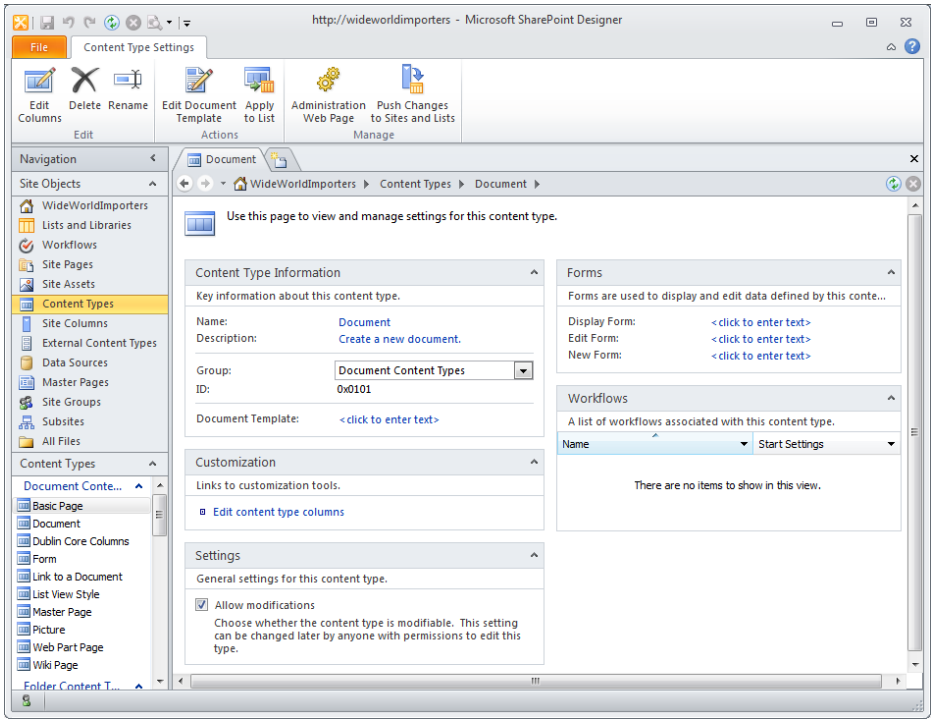
The gallery page displays only those content types that are Document content types. The source column defines where the content types are defined. If your team site is not the root of a site collection, the source column is likely to be the Web address of the site collection.

3. In the **Name** column, under **Document Content Types**, click **Document**.

Troubleshooting If you have not opened the root site of a site collection and the site you have opened has not created any content types of its own, a Microsoft SharePoint Designer dialog box opens with the name of the site where the Document content type is defined. Click OK in the dialog box, open the site in SharePoint Designer using the steps described in the first exercise of this chapter, and then repeat the steps in this exercise.

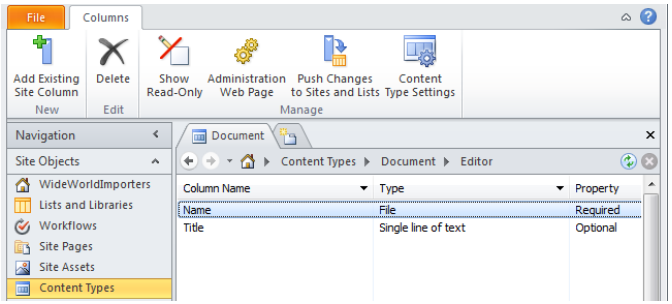


The workspace now contains the settings page for the Document content type. The Content Type Settings tab on the ribbon contains commands to edit and manage the Document content type, and the mini-gallery lists all content types.



4. On the ribbon, click **Edit Columns** in the **Edit** group.

   The workspace contains a gallery page displaying the columns Name and Title, which form part of the Document content type. The ribbon displays a Columns tab with commands to create, edit, and manage columns for this content type.



5. In the mini-gallery, scroll down, and then under **List Content Types**, click **Announcement**.

   Tip To display the mini-gallery the full length of the Navigation pane, use the up arrow to collapse the Site Objects group.

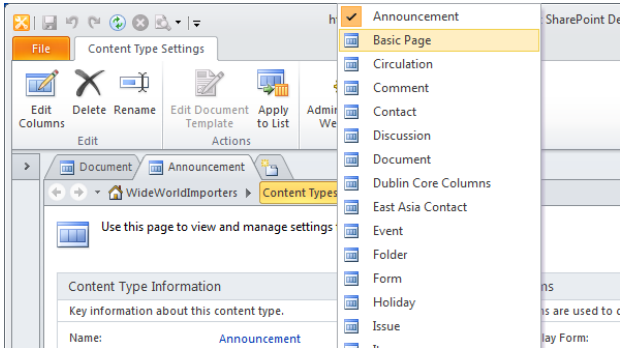
   The workspace now contains the settings page for the Announcement content type. This is the content type used to create all Announcements lists. Notice on the ribbon that the Edit Document Template command is not available because lists have no document template associations.

Collapse the Navigation pane

6. In the **Navigation** pane, click the arrow to the right of **Navigation**.

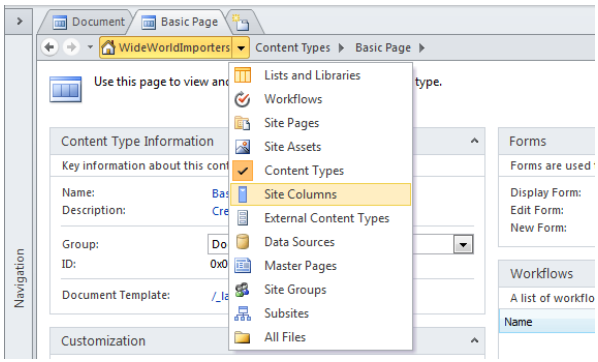
   The Navigation pane collapses, and the workspace expands.

7. On the breadcrumb, click the arrow to the right of **Content Types**, and then click **Basic Page**.

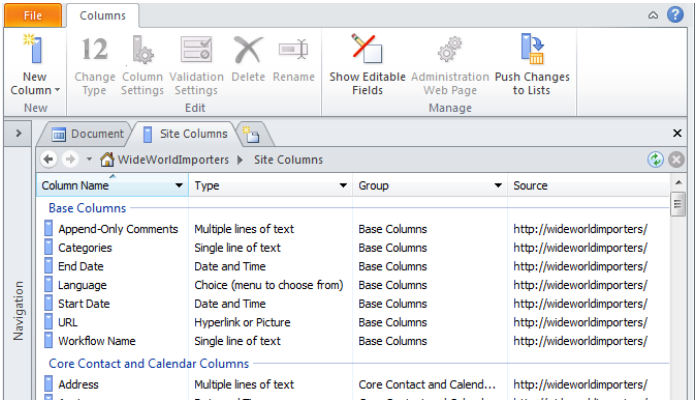


The workspace now contains the settings page for the Basic Page content type. Notice on the ribbon that the Edit Document Template command is active. The Basic Page content type is used to create a document library, and therefore it can have a document template association.

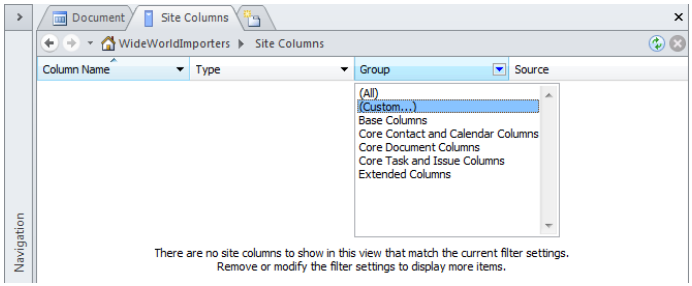
8. On the breadcrumb, click the arrow to the right of your site's name, and then click **Site Columns**.



The workspace now contains the gallery page for site columns.



Troubleshooting If the Site Columns gallery page contains no site columns, the filter you placed earlier on the Group column (in step 2) is still active. Click the arrow in the Group column, and click All.



9. Click the arrow at the top of the **Navigation** pane to expand the pane.

CLEAN UP Close SharePoint Designer.

Saving and Using a Site Template

After customizing your site by applying themes or by adding or removing lists, libraries, pages, and even subsites, you can package everything for additional reuse by making your own site template. A site template is represented by one .wsp file, which is known as a *solution file*, and is stored in the Solutions gallery at the top-level site of a site collection.

When you create a site template, you can choose to save its content, which includes list items, documents, pages, custom pages, master pages and configurations; however, a number of components are not saved, such as permissions.

You can copy solutions files from one site collection to another site collection, thereby allowing you and your users to create multiple sites based on your solution. You do not need to have server administrator privileges to install a site template solution because the Solutions gallery is a document library itself, and as such it is stored in the SQL Server content database and not in a folder on the Web server. If you are a site owner or an administrator of the top-level site, you have sufficient rights to upload a site template solution to the Solutions gallery.

Warning Solution files might contain malicious code, so use site templates only from sources you trust.

Site template solutions are based on files stored on the Web server, which means that if you copy the site template to a site collection on another server, that server must have those site definition files installed. For this reason, many people who design solutions use the team site or the blank site as their basis for creating site template solutions because these site definition files are installed with SharePoint Foundation and SharePoint Server.

Similarly, if your lists or libraries use any site collection custom content types, those content types must be re-created in the destinations site collection's Site Content Type gallery. The same is true for features that may be installed and enabled.

The .wsp file is actually a cabinet file that contains a WebTemplate\Elements file that identifies the site definition files used. Other files in the solutions file identify features that the site template might be dependent on. If you cannot create a site from a site template solutions file, and you suspect that you do not have the site definition files installed on your Web server, you can integrate this file to identify the site definition files you are missing. You might need the help of a developer to identify the cause of the problem.

Each site definition is given a number, and so is each site configuration within a site definition. You can use this information to identify the site definition a site template is based on. The template and configuration number for team and Meeting Workspace site definitions are listed in the following table.

Template	Configuration
1. STS	0 Team Site
	1 Blank Site
	2 Document Workspace
2. MPS	0 Basic Meeting Workspace
	1 Blank Meeting Workspace
	2 Decision Meeting Workspace
	3 Social Meeting Workspace
	4 Multipage Meeting Workspace

After you create a site template solution and before you allow other users to create sites from it, you should create a site based on the template and test your solution to discover whether customizations work successfully after being packaged in a site template. If necessary, also check that they work on other site collections and Web applications.

Note **With SharePoint Server, you can limit the site templates that are visible. See Appendix C on page 503 for a list of steps.**

In this exercise, you use SharePoint Designer to create a site template, save the site template and review its contents, and then create a site from a site template and test your solution.

SET UP Using SharePoint Designer, open the team site you used in previous exercises in this chapter, if it is not already open. The settings page for the site should be displayed.

1. On the **Site** tab, click **Save as Template** in the **Manage** group.

   The browser opens. If prompted, type your user name and password, and click **OK**. The Save As Template page is displayed.

2. In the **File name** box, type **SPDSBS_Sites**, and in the **Template name** box, type **SBS Working with Sites**.

3. In the **Include Content** section, select the **Include Content** check box, and then click **OK**.

   The Operation Completed Successfully page is displayed, stating that the Web site was successfully saved to the Solutions gallery.

4. On the **Operation Completed Successfully** page, at the end of the second paragraph, click **solutions gallery**.

   Tip If the Operation Completed Successfully page is not displayed, click Site Actions, and then click Site Settings. If you are working on a child site, under Site Collection Administration, click Go To Top Level Site Settings. On the site settings page, under Galleries, click Solutions.

5. Click **SPDSBS_Sites**. The **Save As** dialog box opens.

6. Navigate to the **Desktop,** and then click **Save**.

   The Save As dialog box closes. If the Download Complete dialog box opens, click Close.

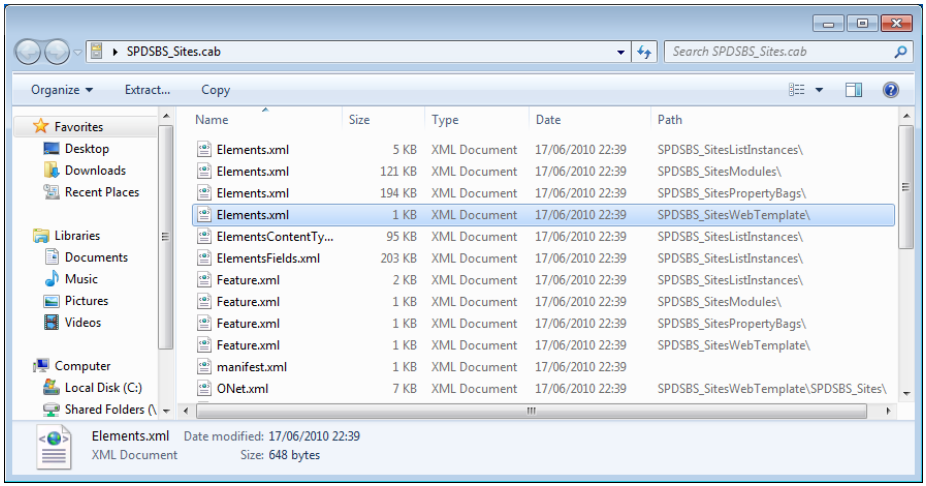
7. On your Desktop, rename SPDSBS_Sites.wsp as **SPDSBS_Sites.cab**.

   A Rename warning dialog box opens, stating that the file might become unstable.

8. Click **Yes** to close the **Rename** warning dialog box.

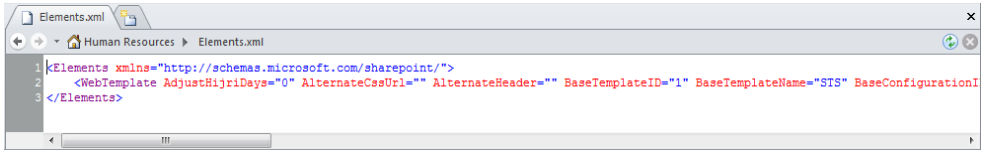
9. Double-click **SPDSBS_Sites.cab** to open the cabinet file, locate **Elements.xml** in the **SPDSBS_SitesWebTemplate** path, and drag it to your desktop.

   Tip You might have to change the Explorer view to Details to see the path.



10. Right-click **Elements.xml,** and click **Edit with Microsoft SharePoint Designer**.

SharePoint Designer displays Elements.xml in the workspace.



The BaseTemplateID has a value of 1, the BaseTemplateName has a value of STS, and the BaseConfigurationID has a value of 0, which means that the SPDSBS_Sites template solution was based on the team site definition.

11. In the **Navigation** pane, click **Subsites**.

A new workspace tab opens, labeled *Subsites*.

12. On the ribbon, click **Subsite** in the **New** group.

The New dialog box opens, and in the Specify The Location Of The New Web Site text box, Subsite is highlighted. SharePoint Designer communicates with the SharePoint site collection and retrieves a list of SharePoint site templates that you can use as a basis for your new SharePoint child site. The SPDSBS_Sites site template is listed in the site type list.

Note There is no visible difference between using site template solutions and site templates stored on the Web server.

13. Type **SiteTest** over Subsite, and in the central pane, click **SPDSBS_Sites**.
14. Click **OK**.

    The new site opens in a new SharePoint Designer window. Notice that the Title and Description site properties of the Human Resources site were not saved.

Preview in Browser

15. On the **Site** tab, click **Preview in Browser** in the **Manage** group.

    The browser opens and displays the home page of the new site.

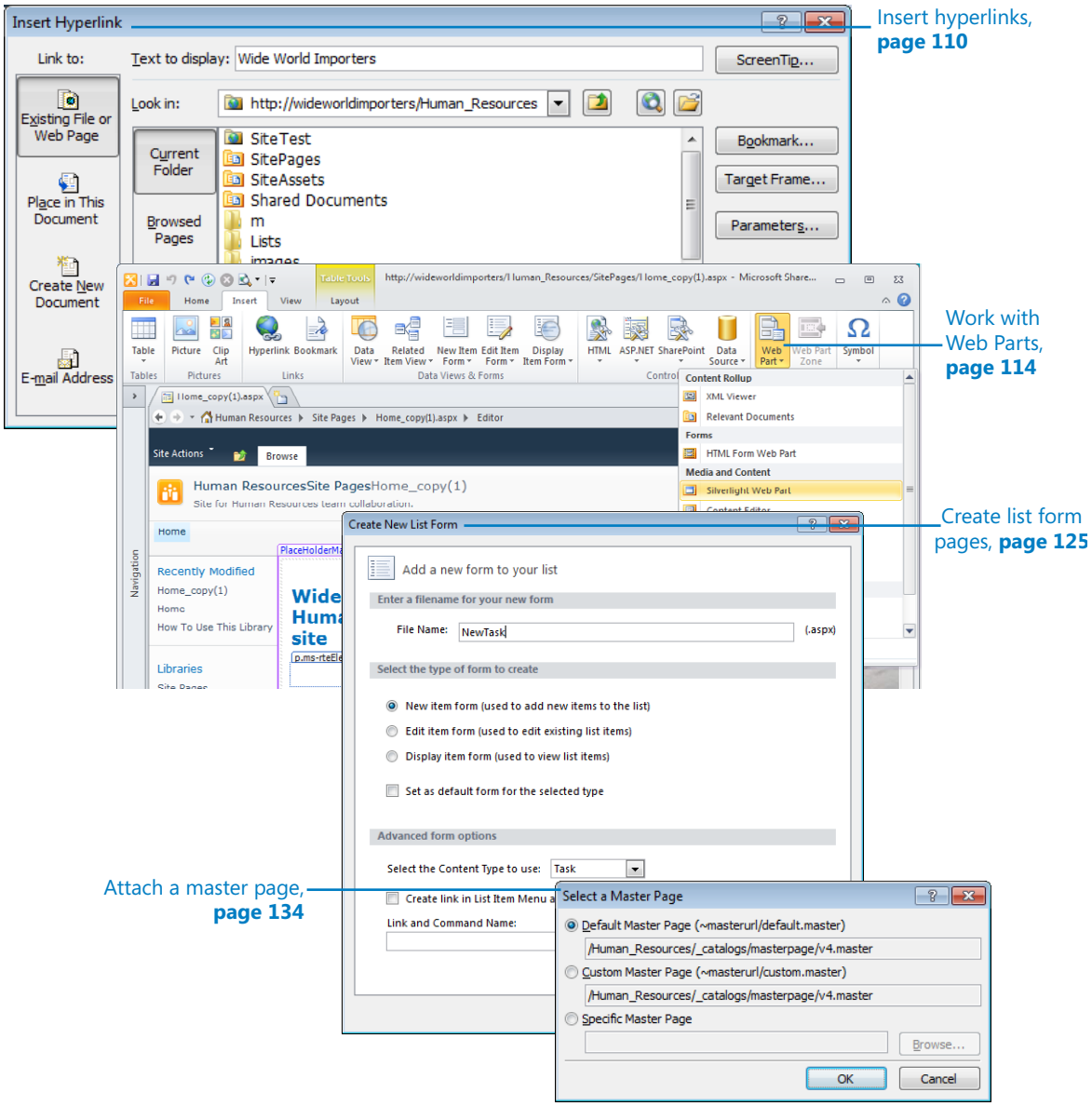
CLEAN UP Close SharePoint Designer.

Key Points

- The SharePoint site properties Title and Description communicate to users the purpose and function of a site. They are also fundamental to making information easy to find.
- Themes can be created using PowerPoint 2010. The .thmx file is then loaded in the Themes gallery at the top-level site of a site collection.
- Themes change the colors and fonts used on a site. If you want to change other design elements, such as font size or spacing, you need to use cascading style sheets.
- Cascading style sheets used on SharePoint sites can be created to not support themes.
- A number of features can be activated at the site-collection level, whereas others can be activated on a site-by-site basis.
- You can use SharePoint Designer to create and manage SharePoint groups and map users and SharePoint groups to permission levels for sites, lists, and libraries
- You cannot change the site template used to create a SharePoint site after the site is created. If the functionality you require is not exposed by a feature, you have to delete and re-create the SharePoint site using a different site template.
- You can delete child sites of a site collection by using SharePoint Designer; however, you cannot delete the top-level site of a site collection. Deleted sites are not sent to the Recycle Bin.
- You can reset customized (unghosted) pages to be uncustomized pages that point to site definition files on the Web server.
- Site components such as site columns and content types can be managed using SharePoint Designer.

- The hidden URL structure of a Web site can be viewed in the All Files mini-gallery.
- You can use site template solution files to package your solutions so that you can use them again. These files are stored in the SQL Server database and are exposed in the Solutions gallery at the top-level site of a site collection.
- Site template solution files are cabinet files with the extension .wsp. These cabinet files contain a number of files that describe how to create a site that includes your customizations.

Chapter at a Glance



4 Creating and Modifying Web Pages

In this chapter, you will learn how to

- ✔ Insert text, ScreenTips, hyperlinks, and images.
- ✔ Work with Web Parts.
- ✔ Change the home page for a Web site.
- ✔ Modify and create list view and list form pages.
- ✔ Create an ASP.NET page and insert a Web Part zone.
- ✔ Attach a master page.
- ✔ Manage Web pages.

With Microsoft SharePoint Designer 2010, you can create a number of different file formats, some of which you might not consider to be Web pages—for example, text and cascading style sheet files and others you might not have heard about before reading this book. Chapter 1, "Exploring SharePoint Designer 2010," explored one file type—the Wiki page. You might also be familiar with Web Part pages and, if you use Microsoft SharePoint Server, publishing pages. Publishing pages are detailed in Chapter 13, "Managing Web Content in the SharePoint Server Environment."

This chapter focuses on Wiki pages and Web Part pages, building on the information in Chapter 1. You'll learn to use the SharePoint Designer ribbon to add static content such as text, ScreenTips, hyperlinks, and images. You'll learn that Wiki pages and Web Part pages are instances of Microsoft ASP.NET 2.0 content pages and that any SharePoint content page can contain one or more Web Parts. You'll also learn how to change the appearance of a Web page by adding Web Part zones, the containers for Web Parts. And you'll learn to manage Wiki pages and Web Part pages by applying permissions, manipulating the versions of these pages, and deleting pages.

Tip You can create Web Part pages by using SharePoint Designer. Creating Wiki pages with SharePoint Designer, although not impossible, is complex. Copying an existing Wiki page or using the browser to create a Wiki page are the most efficient methods.

Practice Files Before you can use the practice files provided for this chapter, you need to install them from the book's companion Web site. For more information about practice files, see "Using the Practice Files" on page xxiii.

Inserting Text, ScreenTips, Hyperlinks, and Images

The browser is the main Web content editing tool for SharePoint. You can complete similar activities using SharePoint Designer in Design view. The standard Windows application shortcuts for the Copy, Cut, Paste, and Undo commands work in SharePoint Designer as they do in any other Windows-based program. However, when you paste contents from other programs, such as Microsoft Word, use the *Paste Text* command, which you can find by clicking the arrow on the Paste command in the Clipboard group on the ribbon, and then add your own formatting. Formatting from other programs can be verbose and might not generate the most efficient Web code.

You can add components, such as text, images, hyperlinks, ScreenTips, and alternate text. ScreenTips are useful because they provide information when users point to hyperlinks. Alternate text allows you to define text that is displayed if an image does not load or if users are unable to see images. Append a period to the end of the words you enter so that users who listen to screen readers are able to understand your pages more easily, especially when two alternative text tags are next to each other.

SharePoint Designer provides a number of tools to manage the graphics that you include on pages:

- **Image conversion** When you insert an image that is not a GIF or JPEG, SharePoint Designer by default converts the file to GIF or JPEG format, depending on the number of colors in the original image. After you insert an image, you can reformat it in SharePoint Designer by using commands on the Picture Tools, Format tab and in the Picture Properties dialog box.
- **Auto thumbnail** You can tell SharePoint Designer to create a small version of an image—a *thumbnail*—and link it to the full-size image that it represents by right-clicking an image and then clicking Auto Thumbnail. Alternatively, select the image and press Ctrl+T.

Tip You can configure the settings for both these image manipulation options by using the Picture and AutoThumbnail tabs on the Page Editor Options dialog box.

For prototyping purposes or for images on team sites, the image manipulation capabilities in SharePoint Designer should be adequate, but if you are producing a public-facing site, you might want to obtain a third-party image-editing tool. Ideally, you should resize image files in an image-editing program before inserting the images into pages, because when you resize an image by using HTML tag attributes, the original image file is downloaded to the user's computer, even though the browser renders the image file at a smaller size. This can cause a page to take more time than necessary to load the page.

Tip If you do not have a third-party tool, you can use Microsoft PowerPoint or Microsoft Picture Manager to resize your picture and reduce the size of the files.

In this exercise, you create a new page based on the home page of a team site. You then add text and quickly format it by using the commands on the Home tab. After adding a hyperlink to the text and associating a ScreenTip with the hyperlink, you will configure the hyperlink so that a new browser window opens when a user clicks the hyperlink.

SET UP Using SharePoint Designer, open the team site you created and modified in earlier chapters. If you did not create a team site, follow the steps for creating the site in Chapter 1. The site settings page should be displayed in the workspace.

1. In the **Navigation** pane, click **Site Pages**.

   The Site Pages gallery page is displayed in the workspace.

2. Click the icon to the left of **Home.aspx**. On the **Pages** tab, click **Copy** and then click **Paste** in the **Clipboard** group.

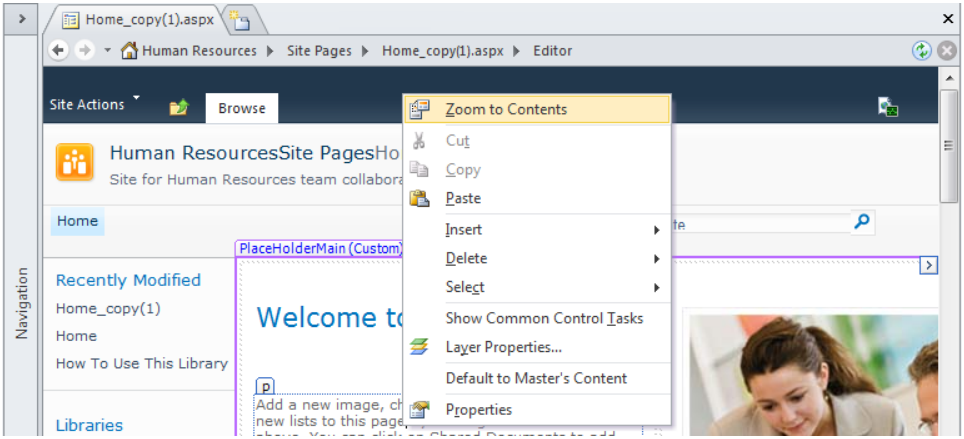
   The file Home_copy(1).aspx appears in the Site Pages gallery page.

Edit File

3. On the **Pages** tab, click **Edit File** to open the page in edit mode, and then click the arrow to the right of **Navigation** on the **Navigation** pane.

   The Navigation pane collapses, providing you with more area in the workspace to modify the page.

4. Right-click anywhere within the **PlaceHolderMain** region, and then click **Zoom to Contents**.



Only the code that is contained within the EmbeddedFormField control is displayed.

5. Select the text **Welcome to your site!**, and type **Wide World Importers Human Resources team site**.

   An asterisk appears on the Home_copy(1).aspx tab, indicating that the page has changed but that you have not saved your changes. This type of page is commonly referred to as a ***dirty page***.

Bold

Center

Hyperlink

6. Select the text **Wide World Importers Human Resources team site**. On the **Home** tab, click the **Bold** button in the **Font** group, and then click the **Center** button in the **Paragraph** group.

7. Select the text **Wide World Importers**, and then on the **Home** tab, click **Hyperlink** in the **Paragraph** group.

   Tip There is also a Hyperlink command on the Insert tab in the Links group.

8. In the **Insert Hyperlink** dialog box, click **ScreenTip**.

   The Set Hyperlink ScreenTip dialog box opens.

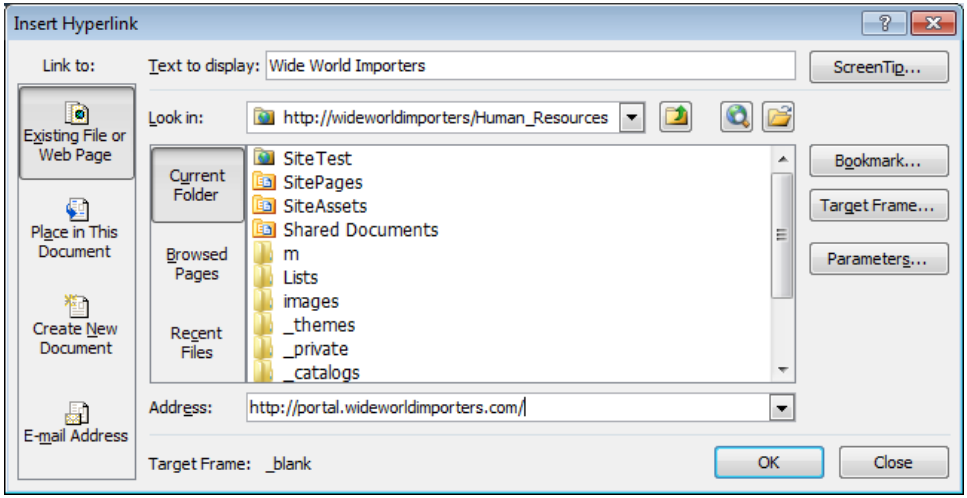
9. Under **ScreenTip text**, type text that describes the Web site, such as **Wide World Importers' intranet site**, and then click **OK** to close the **Set Hyperlink ScreenTip** dialog box.

10. In the **Address** box in the **Insert Hyperlink** dialog box, type the URL of a Web site, such as **http://wideworldimporters**, and then click **Target Frame**.

    The Target Frame dialog box opens.

11. In the **Common targets** list box, select **New Window**, and then click **OK**.

    The Target Frame dialog box closes. The Target Frame area at the bottom of the Insert Hyperlink dialog box *displays _blank*.



Tip Your company might have a policy about when a new browser window should be opened. Generally, you should open a new browser window only in scenarios in which you display a printable version of a Web page or large images. You can find expert usability references on this topic at *www.sitepoint.com/article/beware-opening-links-new-window/* and by using the search keywords *opening, new, browser, window, usability*.

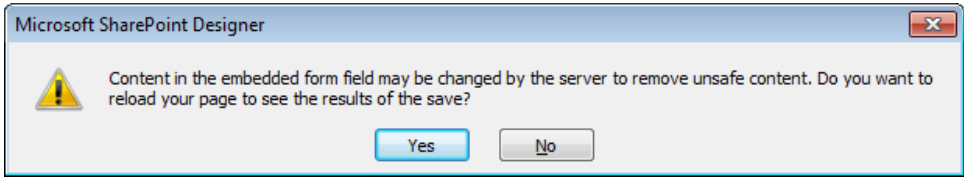
12. Click **OK** to close the **Insert Hyperlink** dialog box.

The Insert Hyperlink dialog box closes. The text *Wide World Importers* is highlighted, and on the Quick Tag Selector, the orange <a> tag appears.

Tip If the orange <a> tag does not appear on the Quick Tag Selector, click elsewhere on the page, and then click the text *Wide World Importers*.

13. On the Quick Access Toolbar, click **Save**.

A Microsoft SharePoint Designer dialog box opens, warning you that SharePoint may have removed unsafe content.



14. Click **Yes** to reload the page within the editor page.

The page refreshes, and no asterisk appears on the Home_copy(1).aspx tab.

CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise.

Important Design view in SharePoint Designer is not a true representation of what you see in a browser. Some aspects of a page might not be displayed the same or some code might not function unless you view the page in the browser. As you make changes to a Web page, you should constantly review the page in a browser and test the functionality of your changes. Every browser is different, so you should also test your page in the set of browsers with resolutions commonly used by visitors to your sites. If you have multiple browsers installed on your computer, you can use the arrow on the Preview command to preview a page in a specific browser at a particular resolution.

Working with Web Parts

In Chapter 3, "Working with Lists and Libraries," you created a Web Part page, inserted an XSLT List View (XLV) Web Part into a Web Part zone, and then customized its properties. You can add the same Web Part to a Web Part page or to a Wiki page by using the browser.

The XLV Web Part is used to display the contents of lists and libraries. Each time the data in the list or library changes, the changes are reflected in the XLV Web Part. You have likely used or seen XLV Web Parts on many pages. For example, when you create a team site, an XLV Web Part on the home page displays files stored in the Shared Documents library. When you display the contents of a task list, the All Tasks view page contains an XLV Web Part. However, you can use many types of Web Parts other than the XLV Web Part.

A Microsoft SharePoint Foundation 2010 installation has 13 built-in Web Parts: Relevant Documents, XML Viewer, HTML Form Web Part, Content Editor Web Part (CEWP), Image Viewer, Page Viewer, Picture Library Slideshow Web Part, Silverlight Web Part, Site Users, User Tasks, SQL Server Reporting Services Report Viewer, What's New, and Whereabouts. Microsoft SharePoint Server 2010 includes more than 50 additional built-in Web Parts, including Business Data List, Content Query Web Part (CQWP), Current User Filter, Excel Web Access, Visio Web Access, Indicator Details, Search Box, Top Federated Results, Web Analytics Web Part, and SQL Server Analysis Services Filter. Of course, your company may have developed its own Web Parts or purchased third-party Web Parts. A detailed description of all the Web Parts you can find in SharePoint Foundation and SharePoint Server are outside the scope of this book.

See Also For more information about Web Parts, see Chapter 20, "Web Parts and Their Functionality in SharePoint Server 2010," in *Microsoft SharePoint Server 2010 Administrator's Companion* by Bill English, Brian Alderman, and Mark Ferraz (Microsoft Press, 2011).

A common mistake made by companies new to SharePoint is to spend thousands of dollars and hours of time developing custom Web Parts when one of the built-in Web Parts would meet their business needs. This is especially true given that SharePoint Designer allows you to create a Data View Web Part (DVWP), also known as a *Data Form Web Part* (DFWP), which is similar to the XLV Web Part and can be used to display and modify data from data sources such as a Microsoft SQL Server database.

See Also For more information about the Data View Web Part, see Chapter 5, "Working with Data Views." The information in Chapter 5 is also relevant to formatting the XLV Web Part.

Web Parts are also classified by where they are located:

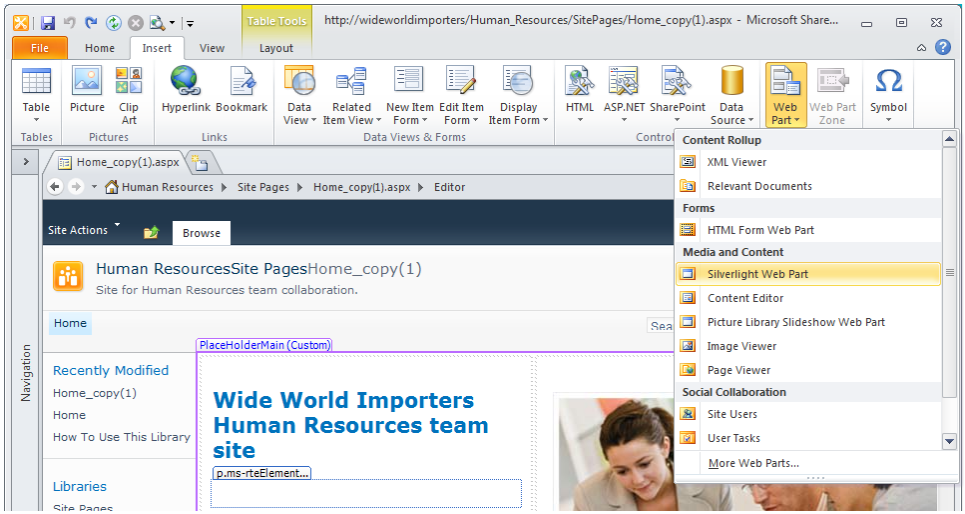
- **Dynamic Web Parts** By using SharePoint Designer or the browser, you can place these Web Parts in the EmbeddedFormField SharePoint control on Wiki pages or in Web Part zones on Web Part pages. Dynamic Web Parts are stored separately from the page, and only when a user requests the page is the SQL Server content database queried to determine the number of dynamic Web Parts, which Web Parts are being used, where to place them on a page, and, if the page contains Web Part zones, in which Web Part zone the Web Parts should be placed.
- **Static Web Parts** These Web Parts are placed outside the EmbeddedFormField SharePoint control or outside Web Part zones. Static Web Parts can be created by using SharePoint Designer in advanced edit mode, but they cannot be created by using the browser. Static Web Parts are stored as part of the page.

In this exercise, you add, modify, and delete a Web Part.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open. Open the home page of the team site in edit mode and zoom to view the contents by using the command on the View tab or by right-clicking the page and selecting the command from the menu. Upload the SilverlightSPDSBS.xap file to your team site's Site Assets library. See "Using the Practice Files" on page xxiii.

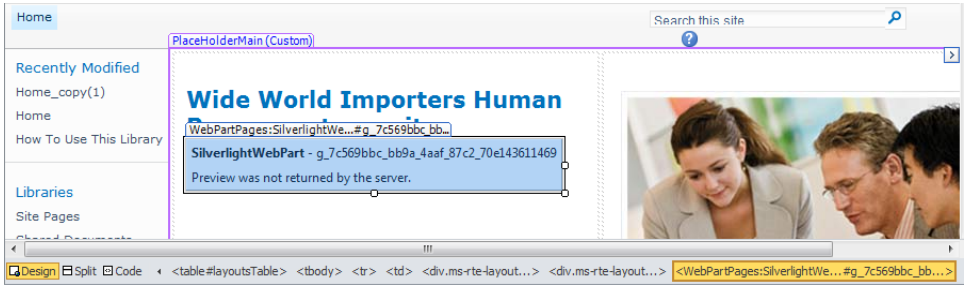
Web Part

1. Place the insertion point on a new line under the text, **Wide World Importers Human Resources team site,** that you added to the page in the previous exercise, and then click **Web Part** on the **Insert** tab.



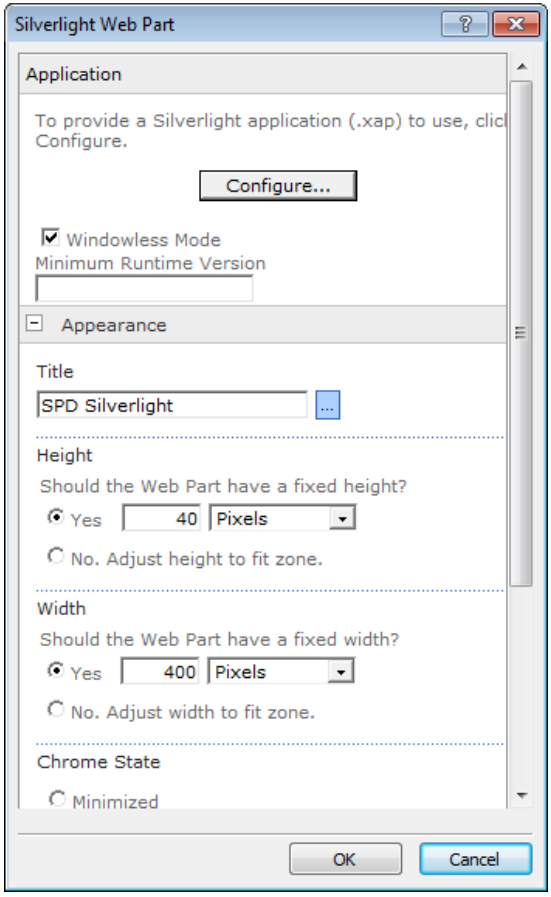
2. On the **Web Part** menu, click **Silverlight Web Part**.

   The WebPartPages:SilverlightWebPart control is added to the page. On the Quick Tag Selector, the orange WebPartPagesSilverlightWebPart tag appears.



3. Double-click the Silverlight Web Part to open the **Silverlight Web Part** dialog box. Click **Configure** to open a second **Silverlight Web Part** dialog box, and in the **URL** box type **~site\siteassets\silverlightSPDSBS.xap**. Click **OK** to close the dialog box.

4. Under **Appearance** in the **Title** box, type **SPD Silverlight**. Under **Height**, select **Yes**, and type **40**.



5. Click **OK** to close the **Silverlight Web Part** dialog box.

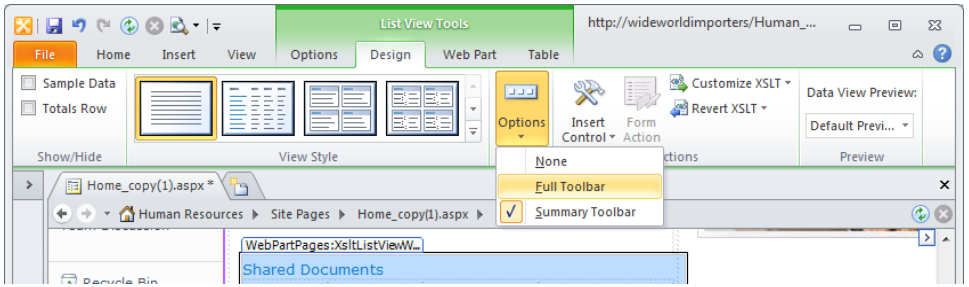
6. Click the Silverlight Web Part, and then on the **Web Part Tools**, **Format** tab, clear the **Edit in Personal View** check box in the **Allow** group.

Troubleshooting If the Edit In Personal View check box is not displayed, click Allow, and then clear the Edit In Personal View check box.

Note The check boxes in the Allow list are the same check boxes as in the Advanced section of a Web Part Properties dialog box.

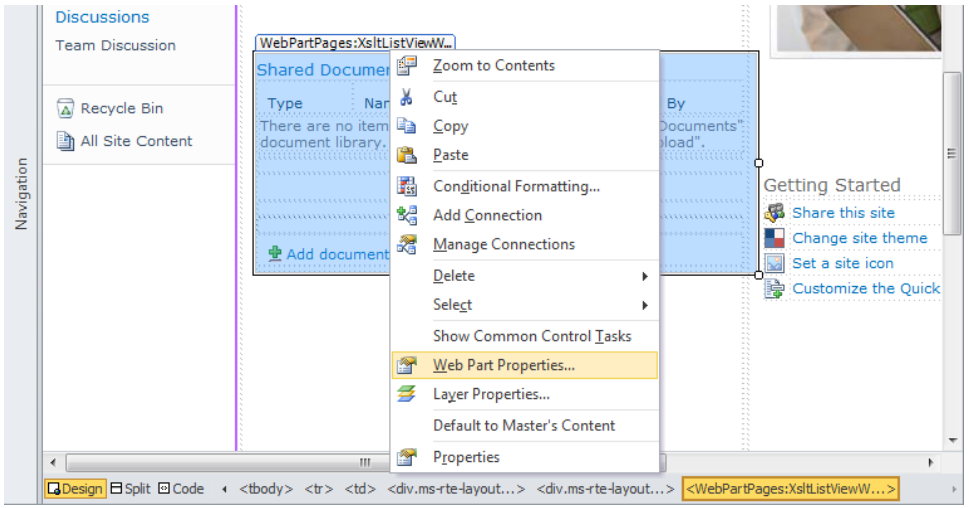
Options

7. In the workspace, click **Shared Documents**. On the **List View Tools**, **Design** tab, click **Options** in the **Toolbar** group, and then click **Full Toolbar**.



The Shared Documents Web Part reloads and the full toolbar is displayed.

8. Right-click **Shared Documents**, and then click **Web Part Properties**.



The Shared Documents dialog box opens.

9. Expand the **Layout** section, and select the **Close the Web Part** check box. Then click **OK** to close the **Shared Documents** dialog box.

10. Press **F12**, click **Yes** to save your changes, and then click **Yes** to reload your page.

Tip On some laptop computers you might need to press the Fn key with the F12 key to preview the page in the browser.

A browser window opens and displays the Silverlight Web Part with a Web Part title of *SPD Silverlight*. The Shared Documents XLV Web Part is not displayed on the page.

Tip Closed Web Parts can increase the time it takes for a browser to load the page. Keep the number of closed Web Parts to a minimum and only close a Web Part when you want to temporarily hide a Web Part and its customizations. In the browser, you can find closed Web Parts by first placing a page in edit mode. Then, on the Editing Tools, Insert tab on the server ribbon, click Web Part, and under Categories, click Closed Web Parts. The Closed Web Parts category appears only if the page contains closed Web Parts. Alternatively, append *?contents=1* to the URL of the page, such as *http://wideworldimporters/SitePages/Home.aspx?contents=1*, to display the page's maintenance page.

11. In SharePoint Designer, click the Silverlight Web Part, and then click the label **WebPartPages:SilverlightWebPart** (above the Web Part) to ensure that the **WebPartPages:SilverlightWebPart** tag is highlighted in orange on the Quick Tag Selector. Press **Delete**.

    The Silverlight Web Part is removed from the page.

Properties

12. Click the Shared Documents XLV Web Part, and then, on the **List View Tools**, **Web Part** tab, click **Properties** to display the **Shared Documents** dialog box. In the **Layouts** section, clear the **Close the Web Part** check box.

Preview in Browser

13. On the Quick Access Toolbar, click **Save**. Click **Yes** to reload the page, and then click **Preview in Browser** on the **Home** tab.

    A browser window opens, the Silverlight Web Part is not displayed, and the Shared Documents Web Part is displayed.

CLEAN UP Close any open browser windows. Leave SharePoint Designer open if you are continuing to the next exercise.

Changing the Home Page for a Web Site

Each site has a home page. This is the page—such as *http://wideworldimporters*—that is displayed in your browser when you type the URL of a site and do not specify a particular page. On a newly created team site or enterprise Wiki site, the home page is configured as *Home.aspx*. On other SharePoint sites, such as a publishing site, a Visio Process Repository site, a Group Work Site, or a document workspace, the home page is *Default.aspx*. On a publishing site, the home page is also known as the Welcome page because it's the page that welcomes a visitor to the site.

Once a SharePoint site is created, you can change the home page by using SharePoint Designer or, on a site on which the Publishing feature is enabled, from the site settings page. When you need to completely redesign your home page, you should create your new home page by using a different page than the page that is the current home page. Once you complete your redesign, you can then make your new page the home page of your site.

Assuming that you save your new page in the Site Pages library, there are several ways to complete this task:

- On the Site Pages gallery page, select your new page and then, on the Pages tab, click Set As Home Page in the Actions group.
- On the Site Pages gallery page or mini-gallery, right-click your new page and then click Set As Home Page.
- In the All Files gallery page or mini-gallery, navigate to where your new page is stored, right-click your new page, and then click Set As Home Page.

  Note You need to have the rights to view the hidden URL structure of the Web site to use this method of completing the task.

- On your new page's settings page, on the Pages tab, click Set As Home Page in the Actions group.

Important When you change your site's home page, you should consider changing the name of the page so that it matches the name of the file for your previous home page. When users bookmark a site, the name of the page is part of the bookmark. If you change the home page but don't update the file name, your users will have bookmarks that are broken links, which can cause a large number of calls to your company's IT help desk, especially for the home page of your Internet site or your company's main portal intranet site.

In this exercise, you change the home page for a site and then test that the change is implemented successfully. You will then reset the site's home page.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open.

1. In the **Navigation** pane, click **Site Pages** to display the gallery page, and then click the icon to the left of the page that you want to set as the home page, such as **Home_copy(1).aspx**.

Set as Home Page

2. On the **Pages** tab, click **Set as Home Page** in the **Actions** group.

   The icon to the left of Home_copy(1).aspx displays a little house.

3. Right-click **Home_copy(1).aspx**, and then click **Preview in Browser**.

   A browser window opens and displays Home_copy(1).aspx.

4. Under the site icon, click **Home**.

   The Home_copy(1).aspx page is displayed again.

5. In the ribbon, click the **Page** tab, and then click **View All Pages** in the **Page Library** group.

   The All Pages view of the Site Pages library is displayed.

6. Under the **Name** column, click **Home** to display the Home.aspx page.
7. On the ribbon, click the **Page** tab, and then click **Make Homepage** in the **Page Actions** group. A dialog box opens. Click **OK** to restore Home.aspx as the home page for the site.

CLEAN UP Close the browser window. Leave SharePoint Designer open if you are continuing to the next exercise. Close all open workspace tabs.

Modifying a List View Page

When you create a list or library, a number of views are created. These views are Web Part pages based on files from the site's defintion—that is, they point to files in the TEMPLATE folder on the Web servers. These Web Part pages use an XLV Web Part to display all or a subset of the contents of a list or library depending on criteria defined by the metadata. These views allow you to display information in different formats without having to enter the information more than once, thereby enabling you and other users to find information easily. Each view page contains one Web Part zone named *Main* that contains one XLV Web Part.

Note Web Part pages are pages that contain at least one Web Part zone. They are not Wiki pages; therefore, to add static text or images to these pages, you need to add the CEWP or image Web Part.

The pages that define views are not stored in the Site Pages library. In lists they are stored immediately below the list container. In libraries, by using the All Files gallery page or mini-gallery, you can see them in the Forms folder for the library. By using SharePoint Designer or the browser, you can modify the XLV Web Part of view pages, and you can add other Web Parts to the Main Web Part zone. SharePoint Designer provides additional customization options, such as inserting and customizing static text and images outside the Web Part zone, but you need to display the view page in advanced edit mode. You can add additional Web Part zones and, in advanced edit mode, add Web Parts outside Web Part zones.

See Also For more information on list and library views and how to work with them in the browser, see Chapter 9, "Working with List and Library Views," in *Microsoft SharePoint Foundation 2010 Step By Step*, by Olga Londer and Penelope Coventry (Microsoft Press, 2011).

In this exercise, you modify the All Items view of a tasks list.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open.

1. In the **Navigation** pane, click **Lists and Libraries**, and then click **Tasks**.

   The tasks list settings page is displayed in the workspace. In the Views area, six view pages are listed: Active Tasks, AllTasks, By Assigned To, By My Groups, Due Today, and My Tasks.

2. In the **Views** area, click **All Tasks** to open the page in edit mode. The workspace tab is labeled **AllItems.aspx**.

3. In the middle of the page, click **Type**.

   A blue border with the label *Main* appears, within which is the label *<webpartpages :XsltListViewWebPart>*. This label indicates that an XLV Web Part is contained within the Web Part zone Main. A purple-bordered rectangle surrounds the Web Part zones, labeled *PlaceHolderMain (Custom)*. The ribbon contains the List View Tools tabs.

Add/Remove Columns

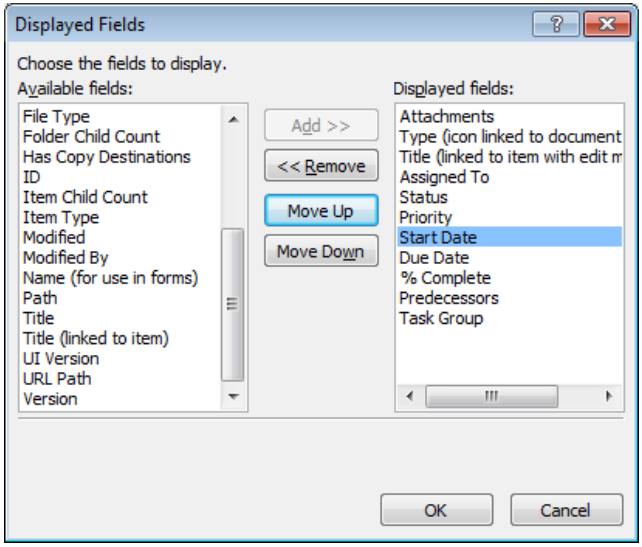
4. On the **Options** tab, click **Add/Remove Columns** in the **Fields** group.

   The Displayed Fields dialog box opens.

5. Under **Available fields**, hold down the **CTRL** key, and select two fields, such as the **Start Date** and **Task Group** fields. Click **Add**.

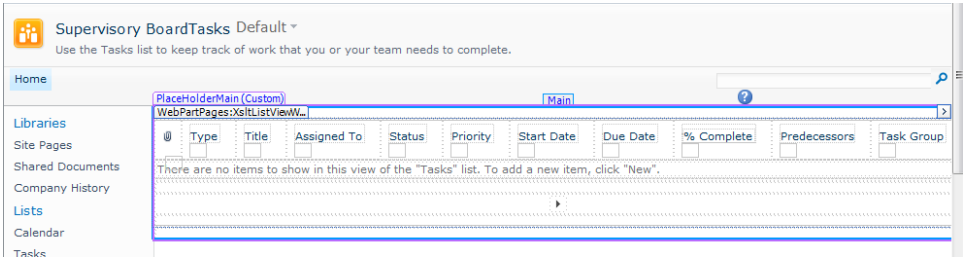
   The two fields, Start Date and Task Group, appear under Displayed Fields.

6. Click **Start Date**, and then click **Move Up** three times so that **Start Date** is above **Due Date**.



7. Click **OK** to close the **Displayed Fields** dialog box.

The workspace is displayed with the Start Date and Task Group columns visible in the Tasks XLV Web Part.



Save

Close

8. Click **Save**, and then close the **AllItems.aspx** tab by clicking the **Close** icon at the top right of the workspace. The site settings page is displayed in the workspace, and the Close icon is now dimmed.

CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise.

Creating List View Pages

The built-in list views that are associated with a list or library might not meet all your needs. In the browser, you can use the sort and filter option on a column of a list view, but this is only a temporary solution because the next time you use the list or library, your sort or filter selections are not applied. By using both the browser and SharePoint Designer, however, you can create new list views and retain your selections. In addition, when you create list views, other formatting options become available, such as the order and visibility of columns, grouping list items in an expanded or collapsed display, or limiting the number of list items displayed.

In this exercise, you create a view for a library to display documents grouped by the person who last modified them and sorted on the modification date and file size. You then make this view the default view.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already.

1. In the **Navigation** pane, click **Lists and Libraries**, and then under **Document Libraries**, click **Shared Documents**.

   The Shared Documents list settings page is displayed in the workspace.

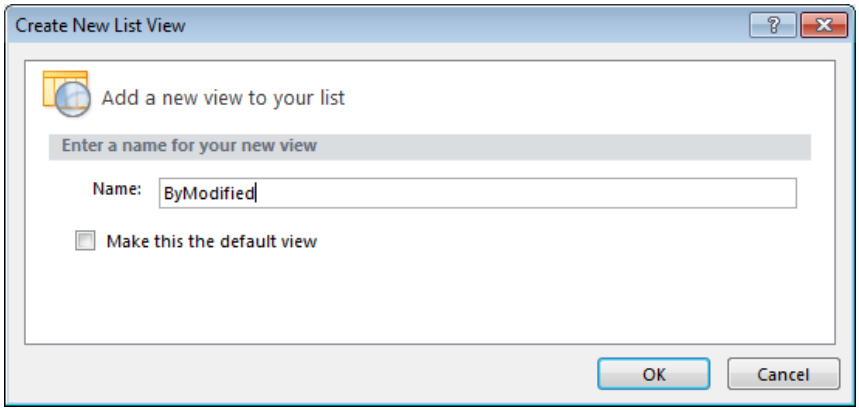
2. On the **List Settings** tab, click **List View** in the **New** group.

List View

The Create New List View dialog box opens.

Tip You can also create a view by using the New button in the Views area.

3. In the **Name** box, type **ByModified**.



The name that you type for the view page forms part of the URL.

See Also For information about naming conventions, refer to the sidebar "Best Practices for Naming URLs" in Chapter 1.

4. Click **OK** to close the **New List View** dialog box.

   The ByModified view appears in the Views area.

5. Right-click **ByModified**, click **Rename**, and then type **By Modified**. Press **ENTER**.

   By Modified is the name of the view you will see in the browser.

6. Click **By Modified** to open the page in edit mode.

   The workspace tab is labeled *ByModified.aspx*. A blue border with the label *Main* appears, within which is the label *<webpartpages:XsltListViewWebPart>*. This indicates that an XLV Web Part is contained within the Web Part zone Main. A purple-bordered rectangle surrounds the Web Part zones, labeled *PlaceHolderMain (Custom)*. The ribbon contains the List View Tools tabs.

Sort & Group

7. On the **Options** tab, click **Sort & Group** in the **Filter, Sort & Group** group.

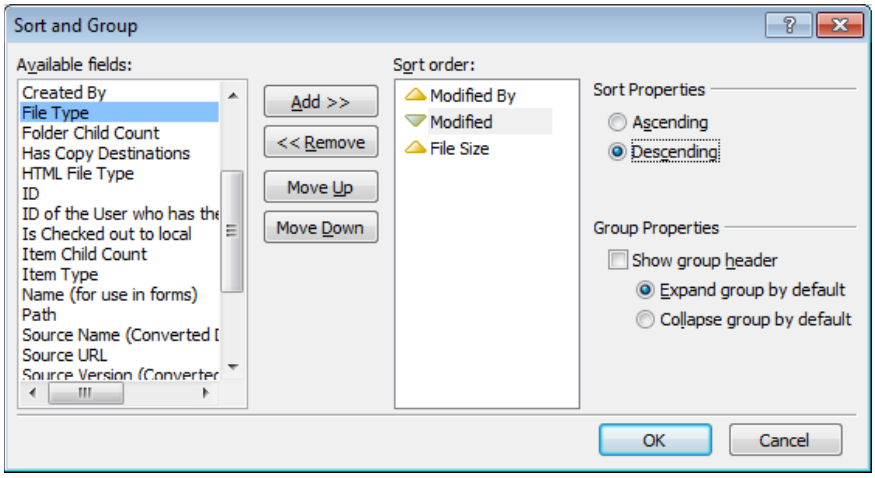
   The Sort And Group dialog box opens.

8. Under **Available fields**, click **Modified By**, and then click **Add**.

9. Repeat step 8 to add **Modified** and **File Size**.

10. Under **Sort order**, click **Modified By**. Then, in the **Group Properties** section, select the **Show group header** check box and click **Expand group by default** if this option is not already selected.

11. Click **Modified**. In the **Sort Properties** section, click **Descending**.



Save

12. Click **OK** to close the **Sort and Group** dialog box. On the Quick Access Toolbar, click **Save**, and then in the breadcrumb, click **Shared Documents** to open the list settings page.

Set as Default

13. In the **Views** area, click the icon to the left of **By Modified** to display the **Views** tab on the ribbon, and then click **Set as Default** in the **Actions** group.

    In the Views area, in the Default column, Yes is removed from the All Documents row and appears in the By Modified row.

Close

14. Close the **ByModified.aspx** tab by clicking the **Close** icon at the top right of the workspace.

    The site settings page is displayed in the workspace.

CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise.

Creating and Modifying a List Form Page

When lists and libraries are created, they provide a number of built-in view pages. They also provide pages you can use to create new list items, edit and display existing list items, upload documents, create a new document, and edit and display metadata associated with documents. These pages are known as *form pages*. Like view pages, form pages consist of one Web Part zone named Main and one Web Part. These pages are displayed as dialog boxes transposed over view pages. However, if you enter the URL of a form page in the browser, you can modify it by using the browser.

View pages use an XLV Web Part, whereas most of the default form pages use a Web Part named the List Form Web Part (LFWP). In SharePoint Designer or the browser, the LFWP customization options are very limited. Unlike the XLV Web Part on view pages, the LFWP does not provide tabs similar to the List View tabs on the ribbon, so you cannot control the order in which fields are displayed or whether a field should appear.

To create a tailored data entry form that provides more customization options, you must use SharePoint Designer and create a new list form page. The list form page contains a Data Form Web Part (DFWP), which you can use to create solutions for viewing and managing data that resides internally or externally to SharePoint sites.

See Also For information about the DFWP, see Chapter 5. For information about how to use controls to provide additional data integrity checks for the data entry form, see Chapter 14 "Using Controls in Web Pages."

When you create a list form, the form does not prevent users from entering list or library data by using Datasheet view or keep users from altering metadata properties by using Microsoft Office applications. To make any additional business logic you incorporate into the list form available for other data entry methods, you need to customize those data entry methods; otherwise, you need to educate your users concerning the differences.

Important When you create your own list form using the DFWP, should you add any new columns to the list, your list form is not automatically updated with the controls to enter data into those columns. You must manually modify your list form to include the necessary text and Data View controls. For more information on controls, see Chapter 14.

In this exercise, you explore the LFWP and create a new list form page.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open.

1. In the **Navigation** pane, click **Lists and Libraries**, and then under **Lists**, click **Tasks**.

   The tasks list settings page is displayed in the workspace. The Forms area contains three forms: DispForm.aspx, EditForm.aspx, and NewForm.aspx. The Type column indicates the type of form (Display, Edit, or New) and whether the forms are the default forms for their type.

   Note The default New form is displayed when you click links in the browser (such as Add New Item) or on the ribbon (New Event in the New group). The default Edit form is displayed when you click Edit Item on the Item menu or on the ribbon, and the default Display form is used when View Item is clicked on the Item menu or on the ribbon.

2. In the **Forms** area, click **NewForm.aspx** to open the page in edit mode, and then click **[Preview of List Form Web Part].**

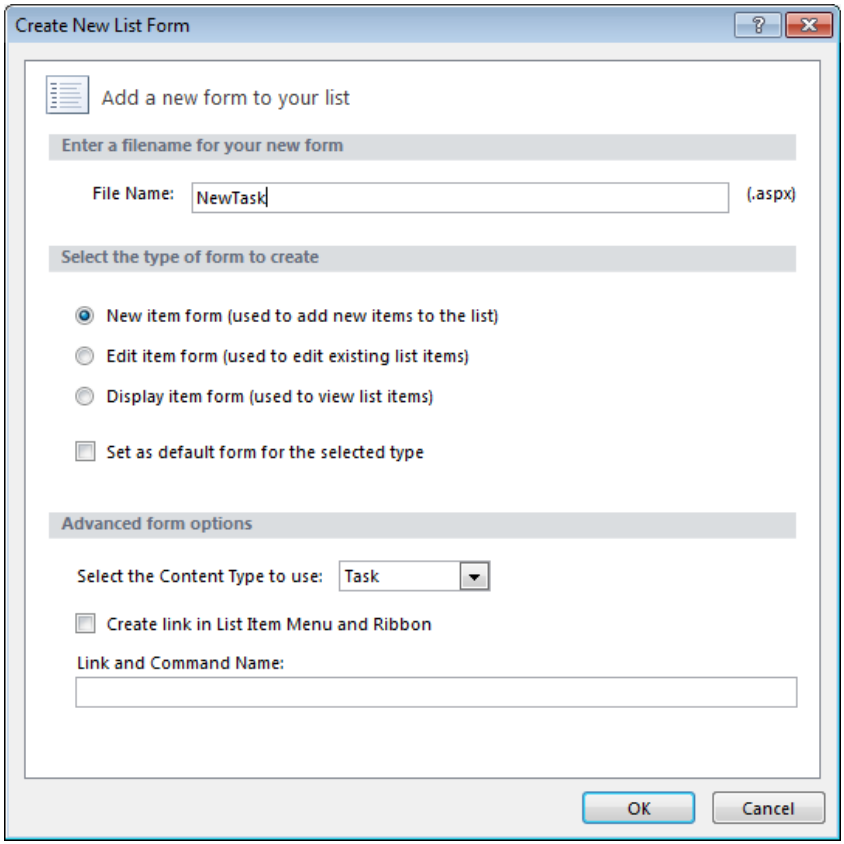
A blue border with the label *Main* appears, within which is the label *<webpartpages:ListFormWebPart>*. This indicates that an LFWP is contained within the Web Part zone Main. A purple-bordered surrounds the Web Part zones, labeled *PlaceHolderMain (Custom)*. The ribbon contains the Web Part Format tab.

List Form

3. On the breadcrumb, click **Tasks** to display the settings page in the workspace. Then, on the **List Settings** tab, click **List Form**.

   The Create New List Form dialog box opens, in which you can change the purpose of the form from inserting a new list item to viewing or modifying list item metadata. You can also change the list or library that this page is associated with and create a link on the List Item menu and ribbon. The Task content type is automatically selected in the Select The Content Type To Use list.

4. In the **File Name** box, type **NewTask**.



5. Click **OK.**

Troubleshooting If a Microsoft SharePoint Designer dialog box opens stating that the list changes to the server could not be saved because the file exists, choose a different name for the list form file name and repeat steps 4 and 5.

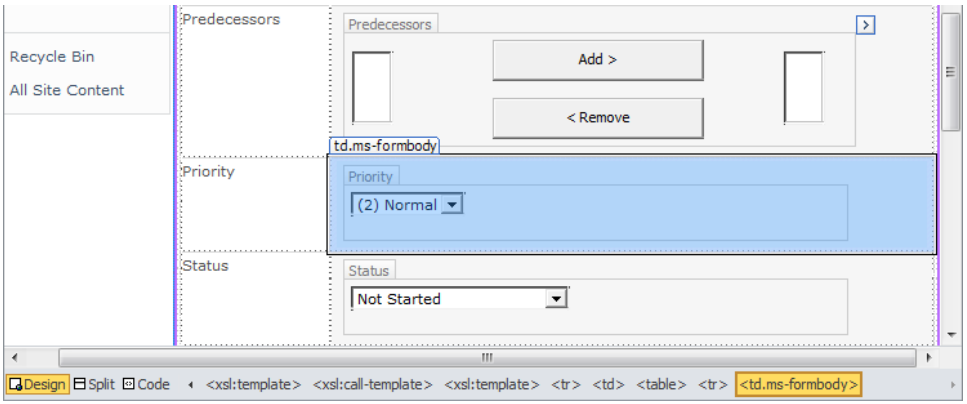
The Create New List Form dialog box closes. On the list settings page, in the Forms area, NewTask.aspx is listed as a New form that is not set as the default.

6. In the **Forms** area, click **NewTask.aspx** to open the page in edit mode.

   A blue border with the label *Main* appears, and a purple-bordered rectangle surrounds the Main Web Part zones, labeled *PlaceHolderMain (Custom)*.

7. In the **Priority** row, click the **Priority** label above the drop-down list. In the Quick Tag Selector, click the **td.ms-formbody** tag.

   The table cell that contains the Priority list is selected.



Split Cells

8. On the **Table** tab, click **Split Cells** in the **Merge** group.

   The Split Cells dialog box opens.

9. In the **Number of columns** text box, type **3**, and then click **OK**.

   Two new cells appear to the right of the Priority list.

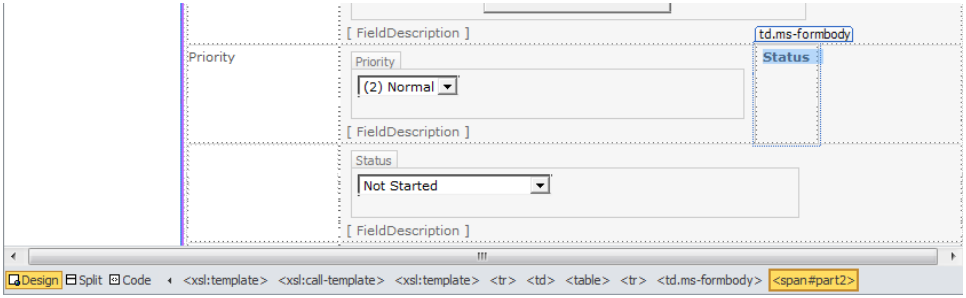
Visual Aids

10. On the **View** tab, click the down arrow on the **Visual Aids** command, and then click **ASP.NET Non-visual Controls** if it is not already selected.

    Below each data entry control the text *[Field Description]* is displayed. If this text is not visible, you might need to turn visual aids off and then on.

11. In the status row, in the first column, click the text **Status**, and then right-click **H3.ms-standardhe**, which appears above the text **Status**. Click **Cut**, and then right-click the cell to the right of the **Priority** list and click **Paste**.

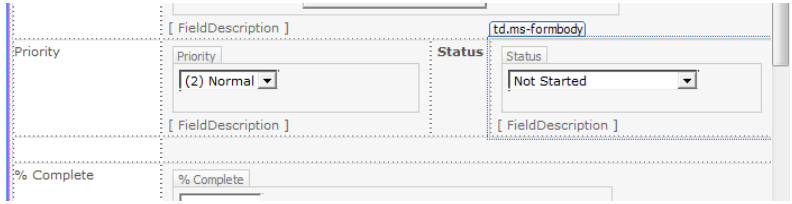
    The text *Status* is displayed in the third cell on the priority row.



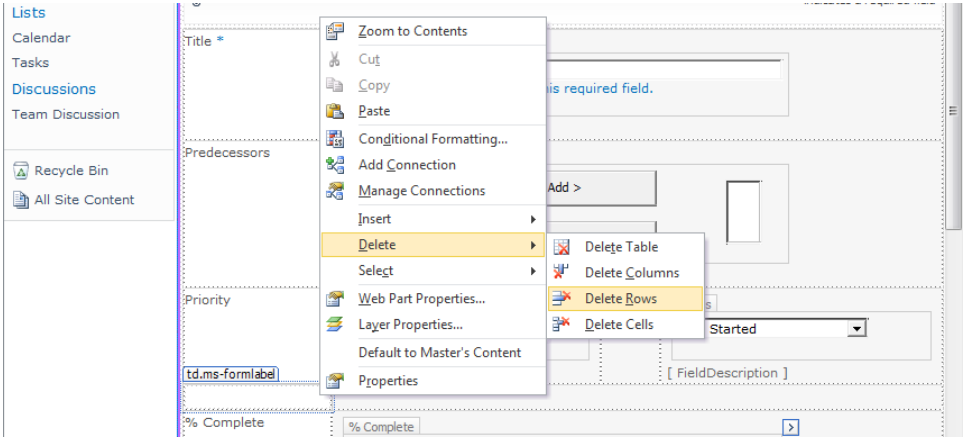
Cut

12. Click the **Status** label above the drop-down list. In the Quick Tag Selector, click the **td.ms-formbody** tag. On the **Home** tab, click **Cut**, and then right-click the cell to the right of the text **Status** and click **Paste**.

The Priority row should now contain the Priority and the Status lists, plus two text labels and two field descriptions. The row that formerly contained the Status text label and the list is now empty.



13. Right-click the empty row, point to **Delete**, and then click **Delete Rows**.



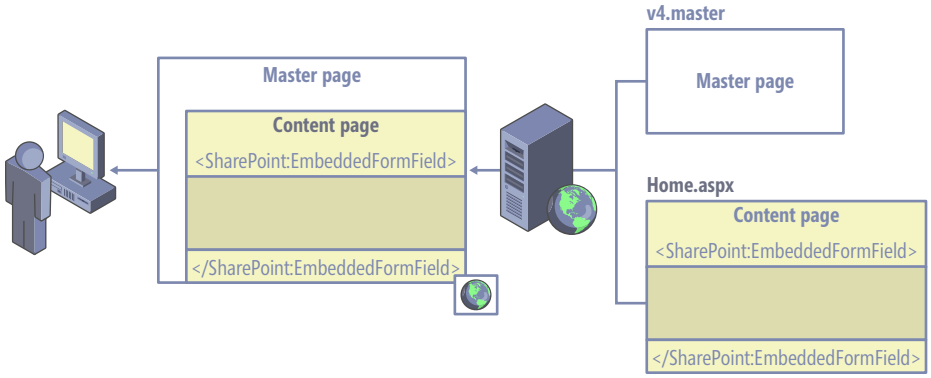
Save

14. On the Quick Access Toolbar, click **Save**, and close the **NewTask.aspx** tab to display the site settings page.

CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise.

Creating an ASP.NET Page

The page you see in your browser when you request a page from a SharePoint site is the combination of two Microsoft ASP.NET pages: a ***master page*** and a ***content page***.



A master page is a special ASP.NET 2.0 page that you can use to share code between pages. It provides a site with a consistent appearance and navigation for each page within a site. You cannot view a master page in your browser, but you can view and customize a master page by using SharePoint Designer.

When you open a content page in Design view, the merged view of the two pages is displayed. In this view, even in advanced edit mode, you can only edit the code that the content page contains. The no-entry icon is displayed if you point to code that the master page contains. In Code view for a content page, you see only the code that the content page contains. An example of a content page is the home page of a team site, which is named Home.aspx.

When you use a browser to request a page from a SharePoint Server publishing site, it can be a combination of three ASP.NET pages: a master page, a page layout, and a content page. (In this scenario, the content page is referred to as a *publishing page*.) On the other hand, when you request a page from, say, a team site or a document workspace, two ASP.NET pages are combined: a master page and a content page. (In this scenario, the content page is referred to as a *nonpublishing page*.) You cannot modify a publishing content page by using SharePoint Designer; you must use the browser. However, you can modify the master page and page layout by using SharePoint Designer.

See Also Master pages are described in Chapter 11, "Working with Master Pages," and customizing publishing pages in Chapter 13, "Managing Web Content in the SharePoint Server Environment."

If you want to create a Web page in SharePoint Designer, you could copy an existing page, as you did earlier in this chapter. Otherwise, you need to create an ASP.NET page, associate a master page, and then insert Web Part zones (thereby creating a Web Part page) or insert the controls that make the page a Wiki page.

All built-in Web Part pages and Wiki pages use tables, but if you are concerned about accessibility, you may want to use HTML tags to lay out the pages you create from scratch. Because you can insert more than one Web Part per Web Part zone, it is common practice to insert one Web Part zone to a table cell or tag.

See Also For more information about page accessibility, see Chapter 12, "Understanding Usability and Accessibility."

In this exercise, you create an ASP.NET page.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open.

1. In the **Navigation** pane, click **Site Pages**. On the **Pages** tab, click **Page** and then click **ASPX**.

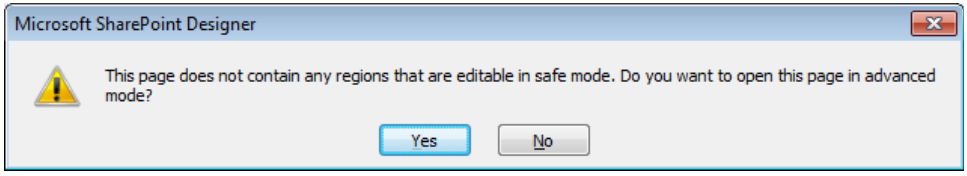
   A file, Untitled-1.aspx, is created and displayed in the Site Pages gallery page. Untitled_1.aspx is selected.

2. Type **OfficeFurniture.aspx**, and then press **Enter** to rename the page.

Edit File

3. On the **Pages** tab, click **Edit File**.

   A dialog box opens, warning that the page does not contain any regions that are editable in safe mode.



4. Click **Yes** to open OfficeFurniture.aspx page in advanced mode.

   A blue-bordered rectangle with the label *form#form1* is displayed in Design view.

Split

5. On the workspace status bar, click **Split**.

   In Code view of the page, the HTML <head> and <body> tags are surrounded by <html> tags. The <body> tags contain <form> tags.

   Tip To see the rectangle, turn on visual aids (on the View menu, point to Visual Aids, and click Show).

CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise.

Inserting a Web Part Zone

With Wiki pages or Web Part pages, users can manipulate the content of a page by using a browser. On Wiki pages, only the content within the EmbeddedFormField SharePoint control can be modified with a browser, and on Web Part pages, only content within Web Part zones. As you develop solutions, you need to develop pages that allow you to provide content owners the ability to add their own content by using the browser. Therefore, developing your own Wiki pages and Web Part pages is important for your solution.

In Chapter 3, you saw how easy it is to use SharePoint Designer to create your own Web Part pages. You are provided with eight different layouts, but these layouts might not meet your needs—you might need to insert, delete, or modify Web Part zones on your Web Part pages or create your own Web Part page from an ASP.NET page. Developers and Web designers can use Microsoft Visual Studio 2010 to define Web Part zones in pages stored in the root directory on a Web server, or you can use SharePoint Designer to insert a Web Part zone into a new or existing page, which is stored in the SQL Server content databases when you save it.

You can insert only Web Parts into Web Part zones; you cannot insert text or images. Web Part zones have properties that affect the presentation of the Web Parts they contain, and they control the actions users are allowed to perform with the browser. These properties are detailed in the following table.

Web Part zone property	Description
Zone title	Used when storing Web Part information in the SQL Server content database. You should give each zone a meaningful and consistent title; for example, don't name the Web Part zone in a left cell *First* on one page and *Left* on another. This is particularly important if you create Web Part zones on page layouts in publishing sites.
Frame style	The default frame style for all Web Parts in the zone. This setting can be overridden by the Web Part Frame Style property.
Layout of Web Parts contained in the zone	Allows you to choose between Top-To-Bottom (Vertical Layout) or Side-By-Side (Horizontal Layout).
Browser settings for Web Parts contained in the zone	Allows you to restrict the modification of the page by browser users. By clearing the three check boxes, you effectively remove the ability to customize any Web Parts placed in the zone by using the browser.

In this exercise, you insert two Web Part zones.

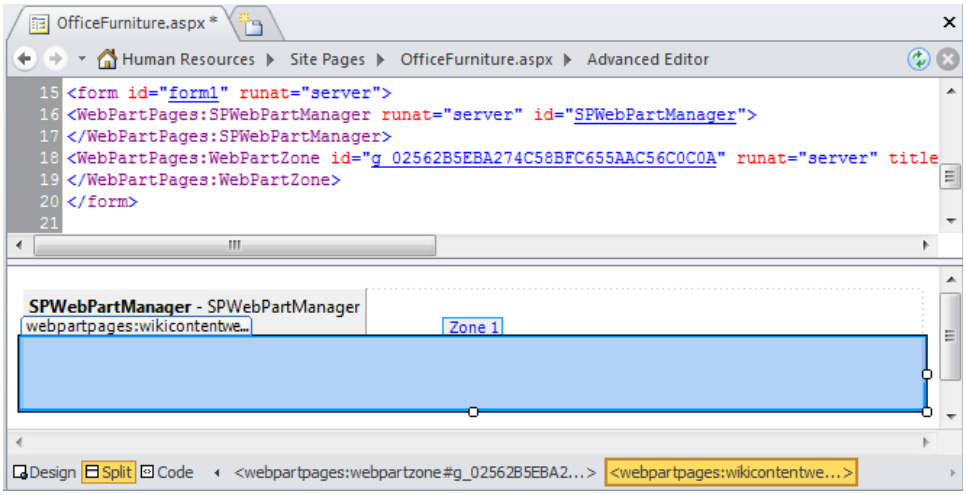
SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open. Open the page where you want to create a Web Part zone, such as OfficeFurniture.aspx, which you created in the previous exercise.

1. Position the insertion point where you want to add a Web Part zone, such as inside the **form#form1** rectangle.

Web Part Zone

2. On the **Insert** tab, click **Web Part Zone** in the **Web Parts** group.

   The Web Part Zone Tools, Format tab is displayed. A Web Part Zone labeled *Zone 1* appears, and the tag label *webpartpages:wikicontentweb* appears to the top right of the zone and in orange on the Quick Tag Selector. If the ASP.NET Non-Visual Controls visual aid is on, you also see the SPWebPartManager SharePoint control above the Web Part zone.



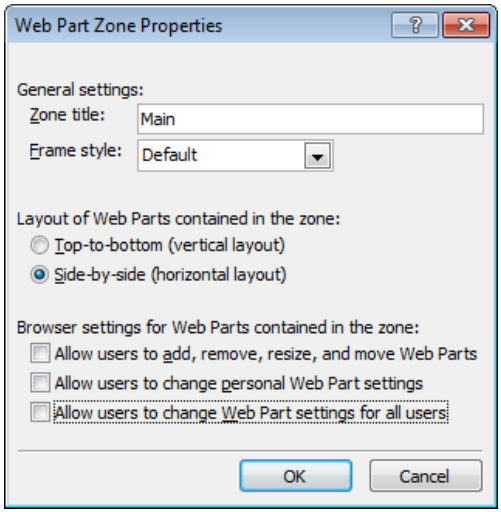
3. On the **Web Part Zone Tools**, **Format** tab, in the **Zone Title** box in the **Web Part Zone** group, delete **Zone 1** and type **Main**.

Zone Layout

4. Click **Zone Layout** in the **Layout** group, click **Side-by-Side (Horizontal Layout)**, and then click **Properties** in the **Web Part Zone** group.

   The Web Part Zone Properties dialog box opens.

5. Below **Browser settings for Web Parts contained in the zone**, clear the three check boxes.



Save

6. Click **OK** to close the **Web Part Zone Properties** dialog box, and then on the Quick Access Toolbar, click **Save**.

Note Now that OfficeFurniture contains a Web Part zone, you do not have to open the page in SharePoint Designer in advanced mode.

CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise.

Attaching a Master Page

In the previous exercises, you created an ASP.NET page and added a Web Part zone to it, but it did not contain any SharePoint site navigation nor did it inherit any look and feel from the SharePoint site. You can envision the page you created as just the content page. It is not associated with a master page, which is the page that defines the common user interface and code. To attach a master page or to change a master page that a content page is associated with, you must open the page in advanced mode.

Each site has one master page configured as the site's master page, referred to by using the token *~masterurl/default.master,* and then all pages associated with the site's master page inherit the same look and feel. When a site is created, all pages created for the site point to the site's master page by using this token. With SharePoint Designer, you can change the master page attached to a page. If a page is not attached to a master page, you can attach the page to the site's master page or attach the page to a specific master page, such as v4.master.

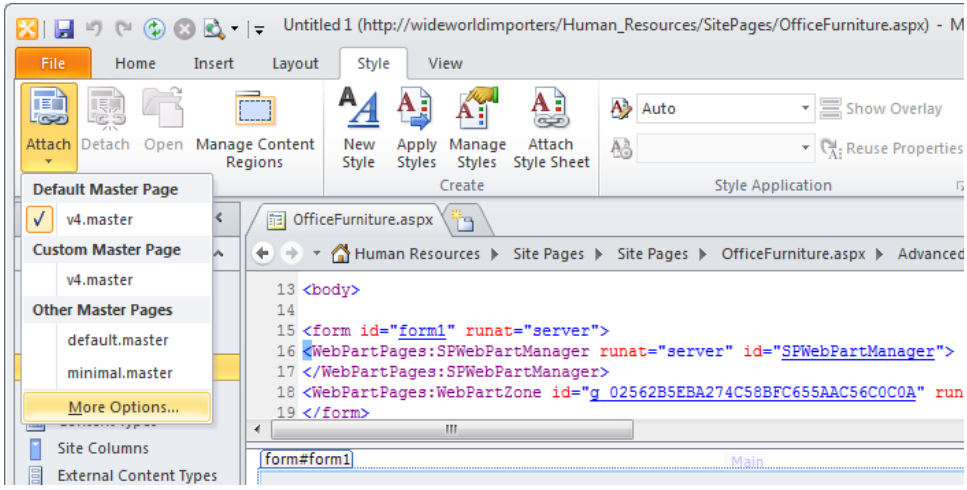
See Also Changing the default master page is described in Chapter 11, "Working with Master Pages."

In this exercise, you attach a page to the site's master page.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open. Open in advanced mode the page, such as OfficeFurniture.aspx, that you want to attach to a master page.

Attach

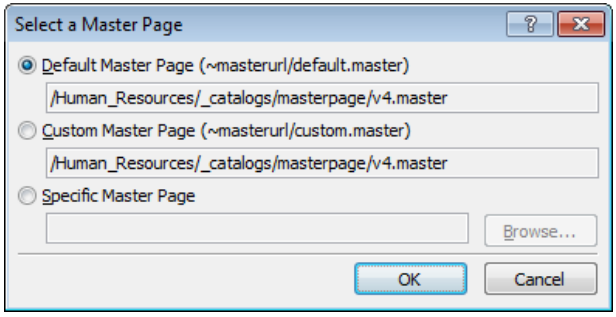
1. On the **Style** tab, click **Attach** in the **Master Page** group, and then click **More Options**.



Note If your page is using the default master page, a check to the left of v4.master indicates that v4.master is configured as the site's master page.

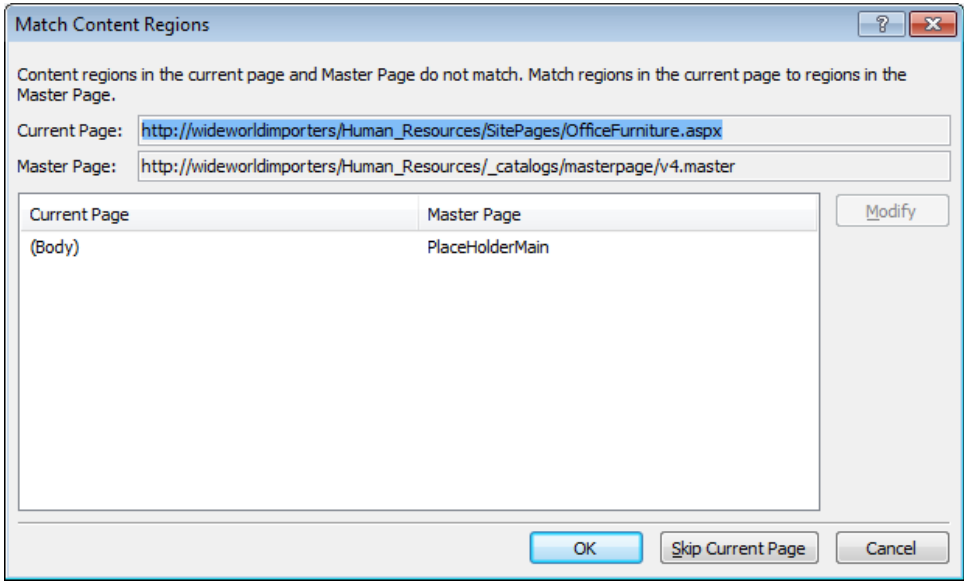
The Select A Master Page dialog box opens.

2. In the **Select a Master Page** dialog box, select **Default Master Page (~masterurl/default.master)** if the option is not already selected.



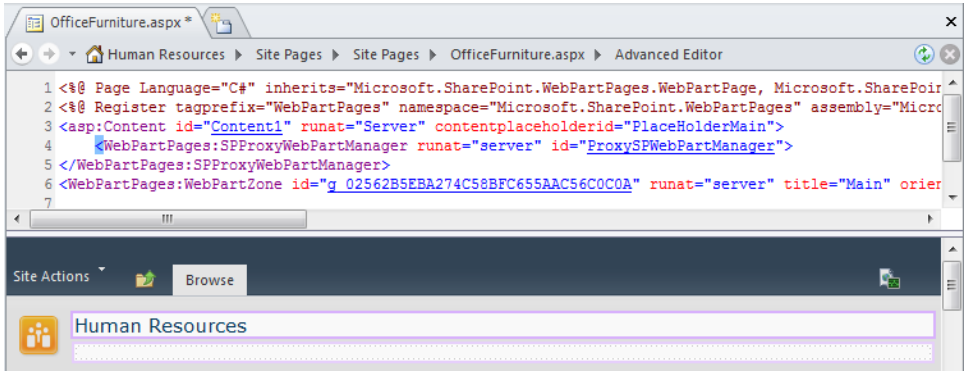
3. Click **OK**.

The Match Content Regions dialog box opens.



4. Click **OK** to accept the default setting of associating all the code within the HTML <body> tags of the current page, OfficeFurniture.aspx, to the content region, PlaceHolderMain on the master page.

   SharePoint Designer redisplays OfficeFurniture.aspx, which now has a SharePoint look and feel. The HTML <html>, <head>, <body>, and <form> tags are removed from the content page because they are defined in the master page.



Save

5. On the Quick Access Toolbar, click **Save**, and then press **F12** to review the page in the browser.

CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise.

Managing Web Pages

As a team site owner with the default SharePoint Designer access configuration, you can manage files on a per-file basis only in the Site Pages and Site Assets libraries. These are the two main libraries you use when you develop SharePoint solutions. The Site Pages library contains your content pages, and the Site Assets library contains other files, such as images, cascading style sheets, XML files, and JavaScript files. As a site collection owner, by using the All Files option in the Navigation pane, you can access all files in all libraries.

On publishing sites, publishing pages are stored in the Pages library and not in the Site Pages library. By default, a publishing site does not contain a Site Pages or Site Assets library. However, if you open a publishing site with SharePoint Designer, both these libraries are created.

When you click a file on the Site Pages or Site Assets gallery page, the files settings page is displayed, which is divided into four areas:

- **File Information** Provides key information about the file, such as file name, created by, last modified by, file version, check in/check out status, and whether the file is based on a file from the site definiton or has been customized.
- **Customization** Use to edit the file or manage the file properties in the browser.
- **Permissions** Use to manage the permission settings for the file. By default, the file inherits its permissions from the list it is stored in, and the list commonly inherits its permissions from the site. As with the site settings page, you can use the Permissions area on the file settings page to stop inheriting permissions, thereby creating unique permissions for the file. Then you can add or remove users or SharePoint groups and configure the access rights of those users and groups to the file by using permission levels.
- **Version History** Use to restore and delete versions of a file. The version numbers are hyperlinks that open the File Version Summary dialog box. Both the Site Pages and the Pages libraries are configured with versioning enabled. The Site Pages document library uses major versions.

  Note The Pages library is configured to use major and minor (draft) versions with content approval because publishing sites are usually used as Internet sites or company portal intranet sites that need a business-approval mechanism.

  See Also Managing publishing pages is detailed in Chapter 13.

When a file's setting page is displayed, the Page tab is visible on the ribbon. This tab allows you to edit, delete, and rename the file; reset the file to the site definition; set the file as the site's home page; check in, check out, and undo the check out of the file; and preview the file in the browser. You are also given a choice of programs in which to edit the file. Any deleted files are stored in the Recycle Bin, from which you can restore them.

Important Although you have not done so in this book (because of page count constraints), you should always check out a file before you edit it and then check it in after you complete your modifications, especially when more than one person has the rights to modify the file.

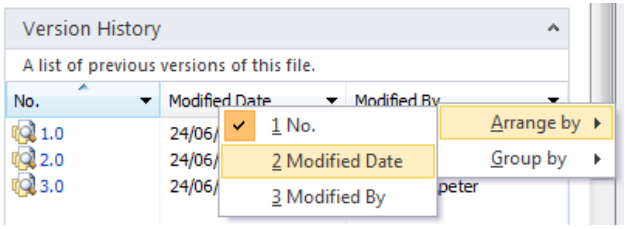
In this exercise, you restore a previous version of a file, check in and check out a file, and delete a file.

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open. The exercise uses the file Home_copy(1).aspx, which was created and amended in previous exercises in this chapter. You can use another file if you want to.

1. In the **Navigation** pane, click **Site Pages** to display the gallery page, and then click **Home_copy(1).aspx**.

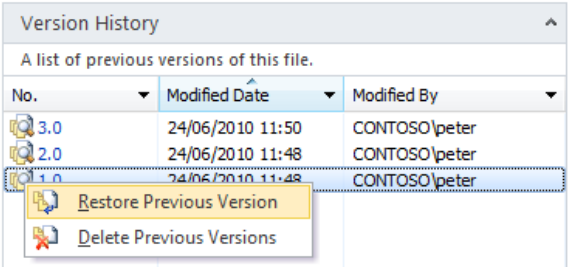
   The Home_copy(1).aspx settings page is displayed. The File Information area shows the current version of the file, and the Permissions area states that the file inherits permissions from its parent. The Version History area displays a number of versions of the file, although the current version of the file is not listed in the Version History area.

2. On the **Version History** area, right-click the **Modified By** column heading, point to **Arrange by**, and click **Modified Date**.



   The Version History area is redisplayed and lists the file versions in modified date order, newest to oldest.

3. Right-click the icon to the left of **1.0**, and click **Restore Previous Version**.



A dialog box opens warning you that the file must be checked out before a previous version of the file can be restored.

Check Out

4. Click **OK** to close the dialog box, and then on the **Page** tab, click **Check Out** in the **Manage** group.

   In the File Information area, the file version is increased, and in the Version History area the original version of the file is displayed at the top of the list.

Check In

5. Repeat step 3, and then on the **Page** tab, click **Check In** in the **Manage** group.

   The Check In dialog box opens.

6. In the **Enter comments for this version** box, type **Restoring the original version of the Home_copy(1).aspx page**, and then click **OK**.

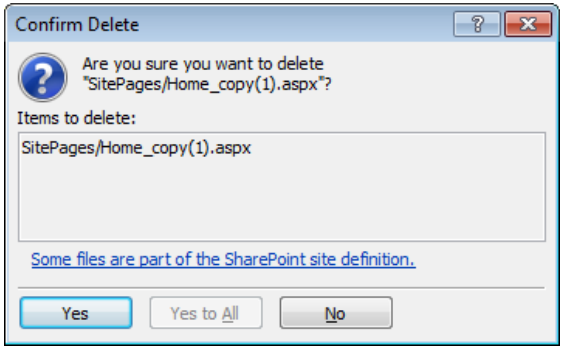
   The Check In dialog box closes.

Preview in Browser

7. On the **Page** tab, click **Preview in Browser**.

   A browser window opens. The modifications you made earlier in this chapter are no longer displayed, and the Welcome To Your Site! text is displayed.

8. Close the browser window. In SharePoint Designer, on the **Page** tab, click **Delete Page** in the **Edit** group.



The Confirm Delete dialog box opens.

Important The Confirm Delete dialog box is different if you are deleting a page that is designated as the site's home page. When a page that is set as the home page is deleted, no page will be assigned as the home page, and the "HTTP 404, The Web Page Cannot Be Found" message is displayed in the browser when users navigate to the site. Before deleting the current home page, set another page as the home page.

9. Click **Yes** to confirm the deletion.

   If you have multiple tabs open, the workspace displays a message that SharePoint Designer cannot display the item; otherwise the Site Pages gallery is displayed.

   Tip When you are closing a tab that points to a file that no longer exists, if a dialog box opens stating that the server cannot complete your request and the tab will not close, click the name of your site on the breadcrumb to display the site's setting page.

Set as Home Page

10. On the breadcrumb, click **Site Pages** if the **Site Pages** gallery is not displayed. Click the icon to the left of **Home.aspx**, and on the **Pages** tab, click **Set as Home Page** in the **Actions** group.

CLEAN UP If you are not continuing with the next chapter, close SharePoint Designer.

Key Points

- On Wiki pages, only the content within the EmbeddedFormField SharePoint control can be modified using a browser, and on Web Part pages, only content within Web Part zones. In SharePoint Designer in advanced mode, you can modify content outside these areas.
- In the Page Editor Options dialog box, you can configure picture conversion formats, auto thumbnail creation, and settings for Design and Code views.
- Web Parts can be inserted outside Web Part zones and the EmbeddedFormField SharePoint control on content pages and on master pages by using SharePoint Designer. These are known as static Web Parts. Web Parts inserted into Web Part zones or the EmbeddedFormField SharePoint control are known as dynamic Web Parts. Details of dynamic Web Parts are stored in the SQL Server database separate from content pages and master pages.
- View pages and form pages both consist of one Web Part zone (named Main) and one Web Part. In the case of a view page, the Web Part is an XLV. In the case of a form page, it is an LFWP.
- You can create a custom data entry form by using a DFWP.
- A nonpublishing page is the combination of two ASP.NET pages: a master page and a content page.

- A SharePoint Server publishing page is a combination of three ASP.NET pages: the master page, a page layout, and a content page. You cannot modify a publishing content page by using SharePoint Designer; you must use the browser. However, you can modify the master page and page layout by using SharePoint Designer.
- Design view for a content page shows the merged view of the master page and the content page, whereas Code view shows only the code of the content page.
- In SharePoint Designer, you can create an ASP.NET page and then attach a master page to give it the look and feel of the SharePoint site.
- Any pages or files you delete in SharePoint Designer are sent to the Recycle Bin, from which you can restore them.
- SharePoint Designer saves all pages to the SQL Server content databases. You can reset pages to site definition pages if they originally pointed to them.

Index

A

Access
  creating linked tables 231–234
accessibility 401
  assistive technologies 419
  best practices 403
  colors 411
    testing 412–414
  legislation 418–423
    maintaining compliance 423–426
  testing 418–423
    Accessibility task pane 421–423
    checklist 420–421
  third-party tools 425–426
  UCD methodology
    implementing 402–403
Accessibility Checker dialog box 421–422
Accessibility Foundation Module (AFM) 425
Accessibility Properties dialog box 157
Accessibility Report.htm file 426
Accessibility task pane 26
  testing accessibility 421–423
Accessible Rich Internet Applications (ARIA) 425
accessing
  sites 52
Action command 261
actions 258–264
  Collect Data from a User 267
  core 259, 483–484
    Add a comment 483
    Add Time to Date 483
    Do Calculation 483
    Log to History List 483
    Pause for Duration 484
    Pause Until Date 484
    Send an Email 484
    Send Document to Repository 484
    Set Time Portion of Date/Time Field 484
    Set Workflow Status 484
    Set Workflow Variable 484
    Stop Workflow 484
  creating 260–262
  document set 259
    Capture a Version of the Document Set 485
    Send Document Set to Repository 485
    Set Content Approval Status for the Document Set 485
    Start Document Set Approval Process 485, 491
  list 259
    Add List Item Permissions 486
    Check In Item 486
    Check Out Item 486
    Copy List Item 486
    Create List Item 486
    Declare Record 486
    Delete Drafts 486
    Delete Item 486
    Delete Previous Versions 486
    Discard Check Out Item 486
    Inherit List Item Parent Permissions 487
    Replace List Item Permissions 487
    Set Content Approval Status 487
    Set Field in Current Item 487
    Undeclare Record 487
    Update List Item 487
    Wait for Change in Document Check-Out Status 487
    Wait for Field Change in Current Item 487
  parallel blocks 259
    creating 260–262
  relational 260
    Lookup Manager of a User 488
  serial 259
  Start Custom Task Process 260
  task 260
    Assign a Form to a Group 488
    Assign a To-do Item 488
    Collect Data from a User 488
    Start Approval Process 488, 491, 493–494
    Start Custom Task Process 488
    Start Feedback Process 488, 494
  task behavior
    Append Task 489
    Delegate Task 489
    End Task Process 489
    Escalate Task 489
    Extract Substring from End of String 490
    Extract Substring from Index of String 490
    Extract Substring from Start of String 490
    Extract Substring of String from Index with Length 490

actions, task behavior (*continued*)
Find Interval Between Dates 490
Forward Task 489
Insert Task 489
Reassign Task 489
Request a Change 489
Rescind Task 489
Send a Task Notification Email 489
Set Content Approval Status (as author) 489
Set Task Field 489
Wait for Change in Task Process Item 489
Wait for Deletion in Task Process Item 489
utility 260
Visio Premium 2010 283
activities (workflows) 258
Add a comment action 483
Add a Comment category (core actions) 259
Add And Customize permission
creating profile pages 234
Add A Workflow page 299
Add Column dialog box 293
Add Field dialog box 265, 303, 495
Add File To Import List dialog box 102, 360
Add List Item Permissions action 486
Add Permissions dialog box 42
Add Time to Date action 483
administrative tasks 503
configuring SharePoint Foundation 2010 504–507
installing SharePoint Foundation 2010 504–507
administrators
site collections 32
ADO.NET Data Services 192
AdRotator control 464, 465
ADRotator.xml 464
Advanced Grouping dialog box 150
Advance Mode command 25
Advance Sort dialog box 161, 162
AFM (Accessibility Foundation Module) 425
AJAX (Asynchronous JavaScript and XML) 176
All Files gallery 121–123
All Files gallery page 74
All Files option 102, 137
All Items view
modifying 121–123
All Operations dialog box 218, 220, 224
All Pages view
Site Pages library 386
Announcements list 54
Announcements XLV
creating 84–86
Append Task action 489
Application Options dialog box 16
applications
InfoPath 2010 309
Web 9
Apply Styles task pane 26, 350, 357
Apply Themes and Borders rights 41
Approval link (Start Approval Process action) 493–494
Approval page
creating approval processes 495–496
approval processes
content 433
creating 491–501
Approval page 495–496
Customization area 497
Settings area 496–497
Task Form Fields area 495
Task Outcomes area 496
outcomes 496
Approval template 251
Approval workflow 296
content pages 429
Approval workflow template 491
variables 493–494
Approval.xsn 491
Approve level 41
approvers 435
Approvers sections 302
Approvers variable 494
approving
page layouts 451–452
ARIA (Accessible Rich Internet Applications) 425
Article Page content type 442
artifacts 14
AspMenu control 477
ASP.NET
controls
IDs 467
validating user data entry 466–468
validation 468–470
forms
testing 475–476
master pages 368
server controls 460, 464–466
validation controls 468–470
ASP.NET pages
attaching master pages 134–136
creating 130–132
creating from master pages 391–395
inserting Web Part zones 132–135
.aspx files 268
assemblies 461
namespaces 461
Assets tab 341

Assign a Form to a Group action 488
Assign a To-do Item action 488
assignment sections 302
assistive technologies 419
associating
  content types 103–104
  reusable workflows with lists 290–292
Association And Initiation Form Parameters dialog box 304, 316, 320
Association columns
  creating 293–294
Association Columns dialog box 293, 294
association fields
  adding to initiation forms 319–322
association forms 301–305
  modifying 318–319
associations 237–242
  associating workflows with libraries 254–258
  cascading 238
  fields 237–238
  Microsoft Business Connectivity Services team 238
  referential integrity 238
Association Wizard 239–243
Asynchronous JavaScript and XML (AJAX) 176
attaching
  CSS files 340–343
  page layouts 454–456
authentication
  external data sources 212
  SQL Server 176
Authentication section
  SharePoint Foundation 2010 195
Authoring tab (Page Editor Options dialog box) 330
Auto Thumbnail
  creating thumbnails 110

B

Backstage view 2, 13–16
BCS 5, 7, 207
  business objectives 208
  central administration 209
  components 210
  Connectivity area 209
  Presentation area 209
  Tools area 209
  Web services 212
BDC (Business Data Connectivity) 209
BDC Identity authenticaton mode (BCS) 212
BDC Metadata Store 210, 231
BDC models
  exporting 230–233
Behaviors task pane 26
best practices
  accessibility 403
  naming URLs 11–13
  usability 403
Blank Master Page command 377
Blank Site, Blog template 13
Borders And Shading dialog box 323
branding sites 327
  adding CSS to Code view 359–362
  attaching CSS files 340–343
  creating CSS files 340–343
  creating HTML pages 344–345
  creating styles 346–349
  CSS inheritance 356–360
  CSS reports 362–364
  deleting styles 349–353
  designing for accessibility 411–414
  identifying CSS styles 333–338
  identifying styles on content pages 339–342
  modifying styles 349–353
  Style Application group commands 353–355
  text 328
breadcrumbs 15
browsers 4
  accessing sites 52
  compatibility 405–406
  deleting workflows 285–287
  editing Web content 110
  inline editing 152–154
  Internet Explorer
    security settings 18
  library tasks 71–75
  list definitions 70
  list settings 75
  list tasks 71–75
  settings
    Web Part zones 132
  starting site workflows 276–277
  testing pages 114
Business Connectivity Services. *See* BCS
Business Data Catalog. *See* BCS
business data columns. *See* external data columns
Business Data Connectivity (BDC) 209
Business Data Related List Web Part 237
  associations 237
business objectives
  BCS 208
business processes
  custom actions 89–95
  solutions 5
buttons
  Site Actions
    master pages 369

C

calculated columns 80–81, 163–165
  XPath expressions 165–168
Calculated Value dialog box 320
Calculated Value Properties dialog box 320
CAML (Collaborative Application Markup Language) 188–190
CancelonChange variable 494
Capture a Version of the Document Set action 485
card sorting 409
cascading associations 238
cascading style sheets. *See* CSS
central administration
  BCS 209
Central Administration Web site 8
Change Data Bindings dialog box 473, 474
Change Request setting 497
Change The Behavior Of A Single Task link 497
Change The Behavior Of The Overall Task Process link 499
Change The Completion Conditions For This Task Process link 497
Channel 9 Web site 313
characters
  components 11
Check For Errors command 267
Check In dialog box 139, 446, 452
checking in/out
  files 138–140
Check In Item action 486
Check Names icon 42
Check Out Item action 486
Check Reports task pane 363
child sites 9, 431
  creating 45–48
  site columns 94
  style inheritance 356
Choose File to Upload dialog box 76
classes
  CSS 331
client computer
  requirements xxv
client software
  licenses 424
  requirements xxvi
Clip Art task pane 27
Clipboard task pane 27
closed Web Parts 119
Code view 20, 21, 25
  adding CSS rules to 359–362
  configuring with Page Editor Options dialog box 21–25
  XSLT 165–168
Collaborative Application Markup Language (CAML) 188–190
Collect Data from a User action 267, 488
Collect Feedback template 251
Collect Feedback workflow 296
collections 9
  administrators 32
  content types
    creating 98–100
  creating 506–507
  creating child sites 45–48
  owners 32–33
  publishing 40
  Publishing feature (SharePoint Server) 431
  root sites
    creating globally reusable Approval workflows 296–298
    creating globally reusable workflows 298–301
  Site Collection Images library 434
Collect Signatures template 251
Collect Signatures workflow 296
Color Coding tab (Page Editor Options dialog box) 330
Color dialog box 413
colors
  accessibility 411
    testing 412–414
  hexadecimal notation 412
  themes 39
Column Editor dialog box 79, 80
columns 56
  Association
    creating 293–294
  calculated
    XPath expressions 165–168
  calculated columns 80–81
  external data 234
  formula 163–165
  list columns 77–79
    deleting 105–106
  lookup 472
  metadata 77
  site
    adding to page layout content types 449–451
    creating 94–96
  site columns 96–98
    adding to content types 100–101
    creating 94–96
  types
    Pages library 438
    publishing sites 443
  validation 81–83
Columns Editor page 106
Column Settings dialog box 266, 303

combining related data
Join option 197
Merge option 197
commands
Action 261
Advance Mode 25
Blank Master Page 377
Check For Errors 267
Create Profile Page 234
Custom Action 93
Data View 145
Data View Preview 149
Edit Document Template 58
From Content Type 377
Hyperlink 112
Initiation Form Parameters 258
Insert group (Workflow tab) 256
Manage group (Workflow tab) 256
Modify group (Workflow tab) 256
Move Down 264
Move Up 264
Quick Publish
publishing InfoPath forms 313–316
Reset To Site Definition 397
Save group (Workflow tab) 256
Style Application group 353–355
Variables group (Workflow tab) 256
Visual Aids 374
XML File Connection 183
comments
core actions 259
Common AdRotator Tasks panel 465
Common Content Task list 339
Common Content Tasks list 390
Common TextBox Tasks panel 467–469
Communications category 70
CompareValidator control 468
compatibility
browsers 405–406
testing 406–407
Compatibility Checker dialog box 406
compatibility requirements
UCD methodology 404–407
Compatibility task pane 27
testing site compatibility 406–407
compliance
accessibility legislation 423–426
third-party tools 425–426
Compliance Sheriff 425
components
BCS 210
characters 11
components, navigating 56
concat function 161
concept prototypes
creating 409
conditional blocks 260
conditional formatting
Data Views 154–157
hiding content 157–160
showing content 157–160
XLV Web Parts 154–157
Conditional Formatting task pane 26
Condition Criteria dialog box 155–156, 158
Condition dialog box 312, 321
conditions 481–482
Created By a Specific Person 482
Created in a Specific Date Span 482
If Any Value Equals Value 481
If Current Item Field Equals Value 481
If Task Outcome Equals Value 482
Modified by a Specific Person 482
Modified in a Specific Date Span 482
Person Is a Valid SharePoint User 482
The File Size in a Specific Range Kilobytes 482
The File Type Is a Specific Type 482
Title Field Contains Keywords 482
conditions (workflows) 258–264
creating 260–262
steps 273
Visio Premium 2010 283
Configuration Successful page 506
Configure Database Connection dialog box 194, 195
Configure Editors tab (Application Options dialog box) 16
Configure External Content Type Profile Page Host dialog box 511
configuring
Code view
Page Editor Options dialog box 21–25
Design view
Page Editor Options dialog box 21–25
permissions
ECTs 510–511
settings
site collections 32–33
SharePoint Foundation 2010 504–507
Confirm Delete dialog box 105, 286
Confirm dialog box 390
Connection Properties dialog box 243
connections
creating 177–180
data
external systems 211
database 175, 192–198
data sources 5, 175–176
databases 175

connections (*continued*)
ECTs
modifying 242–244
external data sources
Outlook 229–231
modifying 177–180
REST services 190–192
server-side scripts
RSS feeds 185–186
SOAP services 188–190
Web Parts 5, 202–205
XML files
RSS feeds 183–184
Connectivity area (BCS) 209
Connect To Outlook option 229
consumers
connecting Web Parts 202–205
Contact Office item type
mapping ECTs to 222–225
content
formula columns 163–165
hiding 157–160
showing 157–160
content approval processes 433
content creators 435
Content Editor Web Part (CEWP)
resetting 49
content pages
Approval workflow 429
content placeholders 387–391
creating 130–132
identifying styles on 339–341
linking with master pages 391–395
ContentPlaceHolder controls 367
managing 387–391
content placeholders
managing 387–391
master page controls 372
PlaceHolderBodyAreaClass 395
PlaceHolderQuickLaunchBottom 394
PlaceHolderQuickLaunchTop 394
PlaceHolderTitleAreaClass 395
content types 56, 438
adding document templates to 101–103
adding site columns to 100–101
adding site columns to page layout 449–451
associating 103–104
creating 98–100
creating Association columns 293–294
defaults 56
Document 56, 57
ECTs
configuring permissions 510–511
external 56
page layouts 442–443
saving 103
Content Types gallery page 100
Content Types (list settings page) 71
Content Types Picker dialog box 104
[Content_Types].xml 278
Contribute level 41
controls 24, 459
AdRotator 464, 465
ASP.NET 460, 464–466
IDs 467
validating user data entry 466–468
validation 468–470
compared to Web Parts 459
CompareValidator 468
ContentPlaceHolder 367
managing 387–391
Controls group 460–463
CustomValidator 469
DataFormWebPart 148, 467
Data source 460, 464
Data View 472–475
EmbeddedFormField 24, 145
Data Views 144
field 434, 438, 439
adding to page layouts 447–449
Page Content 438
properties 447–449
HTML 460
Log In As 15
Login group 464
master pages 372–375
content placeholders 372
delegate 372
icons 372
links 372
menus 372
navigation components 372
scripts 372
namespaces 461
Navigation group 464
PlaceHolderMain (Custom) 454
properties 461
RangeValidator 469
RegularExpressionValidator 469
RequiredFieldValidator 466, 468, 469
server 476–479
SharePoint 460
SPDataSource 472, 473
SPDataSource SharePoint 152
Tag Properties task pane 460–463
validating user data entry 466–468
Validation group 464
ValidationSummary 469

View 464
WebPartPages:DataFormWebPart 380
XsltListViewWebPart 145
Controls group
inserting controls 460–463
server controls 476–479
contros
WebPartPages:DataFormWebPart 382
converting
images 110
copying
libraries 74
lists 74
master pages 377–379
Copy List Item action 486
copyrights
sites 424
core actions 259, 483–484
Add a comment 483
Add Time to Date 483
Do Calculation 483
Log to History List 483
Pause for Duration 484
Pause Until Date 484
Send an Email 484
Send Document to Repository 484
Set Time Portion of Date/Time Field 484
Set Workflow Status 484
Set Workflow Variable 484
Stop Workflow 484
corev4.css 334
CSS inheritance 356–360
customizing 356, 356–360
Create a Content Type dialog box 99, 100
Create A Link To Data Services dialog box 232, 233
Create All Operations option 217
Create A Site Column dialog box 95
Create Column dialog box 235
Create Custom Action dialog box 91, 93
Create Custom Content link 339
Created By a Specific Person condition 482
Created in a Specific Date Span condition 482
Create External List dialog box 226
Create List Item action 486
Create List Or Document Library dialog box 72, 75
Create List Workflow_Shared Documents dialog box 255
Create New List Form dialog box 128
Create New List View dialog box 124, 226
Create Profile Page command 234
create, read, update, and display (CRUD) 216
Create Reusable Workflow dialog box 290, 297
Create Site Collection page 507
Create Site Workflow dialog box 276–277
Create Subsites rights 41
criteria
hiding content 157–160
showing content 157–160
CRUD (create, read, update, and display) 216
CSS 15
adding to Code view 359–362
classes 331
declaration blocks 331
files
attaching 340–343
creating 340–343
HTML tags 331
IDs 331
inheritance 356–360
properties 331
selectors 331
setting options 329–333
styles 331, 332–333
creating 346–349
deleting 349–353
identifying 333–338
identifying on content pages 339–341
inline 340–341
Manage Styles task pane 335
modifying 349–353
rules 335
testing usability 415–418
themes 40
value pairs 332
CssLink control 477
CSS Properties task pane 26, 339, 350, 351, 357
CSS reports 362–364
CSS Reports task pane 27, 364
CSS tab (Page Editor Options dialog box) 329
_cts folder
troubleshooting 102
Current Item link (Start Approval Process action) 493–494
Custom Action command 93
custom actions 89–96
LIM (list item menu) 89, 90–93
Rights Mask 90
sequence numbers 89–91
server ribbon 89, 93–95
uploading images to Site Assets library 90–93
Custom Actions (list settings page) 72, 91
custom activities 260
Customization area
creating approval process 497–499
Customization area (files settings page) 137
Customization area (Workflow Settings page) 257
Customization (list settings page) 71
customized files
resetting 49–52

customized pages 21
customized sites
  upgrading 51–52
customizing. *See also* modifying
  corev4.css 356, 356–360
  Data Views 149–152
  libraries 4
  lists 4
  master pages 377, 379–385
  sites 3
    solutions 6
  workflows
    Start Approval Process action 493–494
  XLV (XSLT List View) Web Part 86–87
Custom Lists category 70
CustomValidator control 469

D

dashes
  URLs (Uniform Resource Locators) 13
data
  combining related data
    Join option 197
    Merge option 197
  connecting from external systems 211
  grouping in Data View 149–152
  importing 76–77
  linked sources 197–201
  retrieving
    from external systems 211
  sorting in Data View 149–152
  XML
    retrieving with server-script connections 185–187
database
  connecting to 192–198
  connections 175
Database Interface Wizard 8
databases 5
  external data sources
    creating 211–215
  SQL Server
    BCS components 210
    creating external data sources 212–215
  SQL Server Compact Edition 229
  tables
    relationships 238
data connections 174. *See* connections
data entry
  Data Views 152–154
  validating 466–468
data entry forms
  creating 469–471
Data Form Web Part 5
DataFormWebPart control 148, 467
Data Form Web Part (DFWP) 115
  creating list form pages 126
Data group
  controls 464
data integrity
  column validation 81–83
Data Protection Act 424
data providers
  connecting Web Parts 202–205
Data Retrieval Service 149
Data source controls 460, 464
Data Source Details task pane 26, 182, 467
  error messages 192
  viewing XML file content 180–182
Data Source Discovery Confirmation dialog box 243
Data Source Library task pane 173
Data Source Picker dialog box 146–147
Data Source Properties dialog box 178, 180–182, 183, 184, 185–186, 188–190, 196, 198
data sources 174–179
  connections 5, 175–176
    databases 175
  Consignments.xml 199
  creating 173
  creating data connections 177–180
  database connections 192–198
  ECTs
    managing 242–244
  external
    authentication 212
    connecting to Outlook 229–231
    creating 211–215
    exporting BDC models 230–233
  external lists 176
  libraries 175
  linked sources 176, 197–201
  lists 175
  managing 173
  modifying data connections 177–180
  Products 199
  REST services 176
    connecting to 190–192
    ExcelRest.aspx 190
    ListData.svc 190
  server-side scripts 176
  SOAP services 176
    connecting to 188–190
  types 211
  Web Parts
    connecting 202–205
  XML files 176

Data Sources gallery page 173, 183–184, 186, 193, 198
creating data connections 177–180
database connections 193
dynamically created definitions 177
modifying data connections 177–180
Data Sources Picker dialog box 173, 381
DataSourceTest.aspx page 183–184, 186, 193, 198
Data View command 145
Data View controls 472–475
Data View Preview command 149
Data Views 143
conditional formatting 154–157
creating 144–149
customizing 149–152
database connections 192–198
data entry 152–154
filtering 176
formula columns 163–165
grouping data in 149–152
hiding content 157–160
inline editing 152–154
linked sources 197–201
master pages 369
modifying text in 149–152
reusing 168–170
showing content 157–160
sorting data in 149–152
XSLT 144
Data View Web Part 5
Data View Web Part (DVWP). *See also* Data Views
adding to master pages 379–385
Date Source Details task pane 160
DDA (Disability Discrimination Act) 411
declaration blocks 331
Declare Record action 486
default master pages 367, 370–371
changing 385–386
global 370–371
global meeting workspace 370–371
minimal.master 370–371
publishing sites 371
v4.master page 370–371
default page 20
defaults
content types 56
Define E-mail Message dialog box 263
Define Workflow Lookup dialog box 273, 274, 305
definition pages
resetting 49–52
definitions (site) 9, 61
delegate controls 372
Delegate Task action 489
Delete Drafts action 486
Delete Item action 486
Delete Items rights 41
Delete Previous Versions action 486
deleting
CSS styles 349–353
ECTs 242–244
files 138–140
objects 105–106
practice sites xxx
sites 48–49
Web Parts 115–119
workflows 285–287
Workflows library files 268
deploying
Web Parts 168–170
workflows 267–273, 269–274
descriptions (sites)
changing 38–40
Design Checker task pane 314
designers 435
Designers site group 32
Design level 41
Design view 20, 25
configuring with Page Editor Options dialog box 21–25
detaching
page layouts 454–456
DFWP (Data Form Web Part) 115
creating list form pages 126
dialog boxes
Accessibility Checker 421–422
Accessibility Properties 157
Add Column 293
Add Field 265, 303, 495
Add File To Import List 102, 360
Add Permissions 42
Advanced Grouping 150
Advance Sort 161, 162
All Operations 218, 220, 224
Application Options 16
Association And Initiation Form Parameters 304, 316, 320
Association Columns 293, 294
Borders And Shading 323
Calculated Value 320
Calculated Value Properties 320
Change Data Bindings 473, 474
Check In 139, 446, 452
Choose File to Upload 76
Choose SPD SBS Customers—Webpage Dialog 236
Color 413
Column Editor 79, 80
Column Settings 266, 303
Compatibility Checker 406
Condition 312, 321

dialog boxes (*continued*)
Condition Criteria 155–156, 158
Configure Database Connection 194, 195
Configure External Content Type Profile Page Host 511
Confirm 390
Confirm Delete 105, 286
Connection Properties 243
Content Types Picker 104
Create a Content Type 99, 100
Create A Link To Data Services 232, 233
Create A Site Column 95
Create Column 235
Create Custom Action 91, 93
Create External List 226
Create List Or Document Library 72, 75
Create List Workflow—Shared Documents 255
Create New List Form 128
Create New List View 124, 226
Create Reusable Workflow 290, 297
Create Site Workflow 276–277
Data Source Discovery Confirmation 243
Data Source Picker 146–147
Data Source Properties 178, 180–182, 183, 184, 185–186, 188–190, 196, 198
Data Sources Picker 173, 381
Define E-mail Message 263
Define Workflow Lookup 273, 274, 305
Downloading Data 255
Edit 164
Edit Hyperlink 416, 475
Edit URL 181–183
Edit Variable 266
Export BDC Model 231
Export Select As 396
Export Workflow 281
External Content Type Rename Confirmation 217
External Content Type Selection 239
External Data Source Type Selection 214
File Save 231
Filter Configuration 220, 243
Filter Criteria 384
Find And Replace 28, 29, 375
Form Actions 474
Form Actions Settings 475
Import 181–183, 360, 416
Import Workflow From Visio Drawing 282
Included Fields 178
Insert Formula 164, 165, 166–168
Insert Formula And Condition 312
Insert Hyperlink 91, 113
Insert Picture 310
JobApplication—New Item 269–270
Join Subview 201
Lookup For Integer 274
Lookup For Person Or Group 262, 266
Lookup For String 262, 291
Manage Content Regions 388, 389
Match Content Regions 135–136, 478
Message From Webpage 448
Microsoft InfoPath 314
Microsoft Office Customization Installer 229
Microsoft SharePoint Designer 42, 43, 44, 113, 396, 453
  publishing process 269
Microsoft Visio 281
Modify Field 316
Modify Style 155, 157, 352
More Colors 412, 413
More Fields 383
New 46, 63, 386
New Link—Webpage Dialog 437
New List View 124
New Page 435
New Publishing Site 432
New Style 341, 347
New Web Part Page 392–396
Options 19, 22
Page Editor Options 20, 22, 111
  Authoring tab 330
  Color Coding tab 330
  configuring Code view 21–25
  configuring Design view 21–25
  CSS tab 329
  setting CSS options 329–333
Picture 157
Picture Properties 423
Please Wait 433
Problem Details 422
Profile Page Creation 235
Reset To Site Definition 50
Save As 314
Save Web Part To Site Gallery 169
Select A Connection Definition File 232
Select A Field Or Group 321
Select a Master Page 392
Select A Master Page 135
Select Style Sheet 342, 347
Select Task Process Participants 493
Select Users 262, 266
Select XML File 465
Server Error 195
Set Hyperlink ScreenTip 112
Shared Documents 118
Silverlight Web Part 116
Site Columns Picker 97, 101, 450
Site Definition Page Warning 390, 397
Site Settings 8

Site To Load Templates From 432
Solutions Gallery: Upload Solution xxviii
Sort And Group 124, 149, 161, 228
Split Cells 128
SQL Server Connection 214
String Builder 291, 306, 307
Text Box Properties 311, 319
User Account Control 507, 509, 510
Verify Hyperlinks 417
View 94
Web Part Zone Properties 133
Windows 461
Windows Security 44
Workflow Error 512
Workflow Errors Found 267–273
Workflow Form Update Required 317
Workflow Settings 513
Workflow Task 271
XPath Expression Builder 164
DIP (document information panel) settings 56
dirty pages 112
Disability Discrimination Act (DDA) 411
disabling
user-defined workflows 511–512
Discard Check Out Item action 486
DispForm.aspx 72, 126
displaying
settings page 54
Disposition Approval template 251
 tag 337
inserting Web Part zones 131
 regions
creating 344–345
DLLs 461
Do Calculation action 483
Document content type 56, 57
document information panel (DIP) settings 56
document set actions 259
Capture a Version of the Document Set 485
Send Document Set to Repository 485
Set Content Approval Status for the Document Set 485
Start Document Set Approval Process 485, 491
document templates
adding to content types 101–103
Don't Attempt To Authenticate option (Data Source Properties dialog box) 185
Downloading Data dialog box 255
Dragon voice recognition software 420
drawings (Visio Premium 2010)
exporting workflows to 283–284
DVWP (Data View Web Part). *See also* Data Views
adding to master pages 379–385
dynamic-link libraries. *See* DLLs
dynamic Web Parts 115

E

ECM. *See* Enterprise Content Management
ECTs 5, 56, 176
associations 237–242
referential integrity 238
configuring permissions 510–511
connecting data 211
connections
modifying 242–244
creating 216–221
Microsoft Office applications 222–225
deleting 242–244
managing 242–244
Office applications 228–231
profile page host, configuring 511–512
profile pages
creating 233–237
retrieving data 211
saving 222
Summary view 216
ECTs (external content types) 209
Edit Browser List
expanding browsers 405
Edit dialog box 164
Edit Document Template command 58
EditForm.aspx 72, 126
Edit Hyperlink dialog box 416, 475
editing
inline editing
Data Views 152–154
pages
safe mode 21
site groups 43
editing links
adding to Data Views 152–153
editor page 20
editors 15
Edit template
inline editing 152–154
Edit URL dialog box 181–183
Edit Variable dialog box 266
Else branch (workflows) 273
e-mail
links 13
EmbeddedFormField control 24, 145
Data Views 144
enabling
site templates on server sites 507
user-defined workflows 511–512
End Task Process action 489
Enterprise Content Management 429
Enterprise Search Center site template 431
enterprise searches 38

Enterprise Wiki Page content type 442
error messages
  Data Source Details task pane 192
errors
  reusable workflows 319
Escalate Task action 489
European Commission Directive on Data Protection 424
events
  requesting publishing pages 439–440
  Task Process Behaviors page 499–501
Excel
  creating lists 72–74
  importing data to create lists 76–77
exercises
  practice files xxvii–xxviii
Expense Approval association form 300
Expense Approval initiation form 301
Expenses settings page 101
Export BDC Model dialog box 231
exporting
  BDC models 230–233
  master pages 395–396
  workflows to Visio drawings 283–284
Export Select As dialog box 396
Export Workflow dialog box 281
expressions
  XPath expressions 165–168
Expression Web 8
eXtensible Stylesheet Language Transformations. *See* XSLT
External Content Type gallery page 213
External Content Type Information area 229
External Content Type Rename Confirmation dialog box 217
external content types. *See* ECTs
External Content Type Selection dialog box 239
External Content Type settings page 213
External Content Types gallery page 231
  creating external lists 226–228
external data columns 234
external data sources
  authentication 212
  BDC models
    exporting 230–233
  connecting to Outlook 229–231
  creating 211–215
External Data Source Type Selection dialog box 214
external lists 5, 176, 209
  creating 225–228
  managing 225–228
  Outlook 229
  SharePoint Workspace 228
external systems
  associations 237–242
  connecting data 211
  retrieving data 211
Extract Substring from End of String action 490
Extract Substring from Index of String action 490
Extract Substring from Start of String action 490
Extract Substring of String from Index with Length action 490

F

FAST Search Server
  licenses 424
features 431
  definition 40
  SharePoint Server Publishing 40
  SharePoint Server Publishing Infrastructure 40
field controls 434, 438, 439
  adding to page layouts 447–449
  Page Content 438
  properties 447–449
fields
  associations 237–238
    adding to initiation forms 319–322
  list columns 77–79
  primary key 237
file formats
  images 110
File Information area (files settings page) 137
files
  Accessibility Report.htm 426
  ADRotator.xml 464
  AnnouncementsTitleBody.xml 178
  .aspx 268
  checking in/out 138–140
  Consignments.xml 198
  ConsolidatedMessenger.png 464
  [Content_Types].xml 278
  corev4.css 334
  CreateDVWP.aspx 149, 161, 166–168
  CSS
    attaching 340–343
    creating 340–343
  customized
    resetting 49–52
  deleting 105–106, 138–140
  LucernePublishing.png 464
  practice xxiii–xxiv
    exercises xxvii–xxviii

restoring versions of 138–140
SBSSPDPracticeSite_Starter.wsp 177–180, 254–258, 373
Shipments.xml 180–182
SilverlightSPDSBS.xap 115
SPDSBSPracticeSite_Starter.wsp
creating Data Views 145–149
Stock.aspx 154–155, 157–159, 164–165, 169–170
.vwi 278
exporting workflows 283–284
WebUIValidation.js 469
WideWorldImporter.png 464
workflow.vdx 278
workflow.xoml 278
workflow.xoml.rules 278
.wsp 60, 61
moving workflows between sites 283–284
saving reusable workflows as 294–295
WSP solution
creating sites from xxix
removing xxix–xxx
uploading xxviii–xxix
XML 176
adding to Site Assets library 180–182
RSS feed connections 183–184
.xoml 268
.xoml.rules 268
.xoml.wfconfig.xml 268
.xsn 268
File Save dialog box 231
file settings page 137–138
Filter Configuration dialog box 220, 243
Filter Criteria dialog box 384
Filter Parameters page (Operations Wizard) 216
filters
Data Views 176
Find 1 task pane 26
Find 2 task pane 26
Find And Replace dialog box 28, 29, 375
Find Interval Between Dates action 490
Folder List task pane. *See* Navigation pane
folders
_cts
troubleshooting 102
_styles 358
TEMPLATE 9–10
Workflows library 268
fonts
Times New Roman 22
foreign key 238
Form Actions dialog box 474
Form Actions Settings dialog box 475
formatting
conditional
Data Views 154–157
hiding content 157–160
showing content 157–160
form pages
creating 125–129
modifying 125–129
forms
Approval.xsn 491
Approvers sections 302
ASP.NET
testing 475–476
association 301–305
modifying 318–319
collecting information from users on workflow startup 258
data entry
creating 469–471
Data Views 152–154
DispForm.aspx 72, 126
EditForm.aspx 72, 126
Expense Approval association 300
Expense Approval initiation 301
InfoPath 258
modifying 308–312
publishing 313–316
saving 313–316
initiation
adding association fields to 319–322
creating 301–305
modifying parameters 316–318
questions 302
retrieving values from 305–308
NewForm.aspx 72, 126
task
collecting information 495
modifying 322–323
Forms area 126
Forms area (Workflow Settings page) 257, 272
Forms (list settings page) 72
formula columns 163–165
Forward Task action 489
Foundation sites
searches 38
frame styles
Web Part zones 132
From Content Type command 377
Full Control level 41
functionalities
rating
SharePoint Server 2010 449–451
functions
concat 161

G

galleries
  All Files 121–123
  List Template 70
  Master Page 443
  Mini 15
  Page Layout 444
  Site Assets
    file settings page 137–138
  Site Pages
    file settings page 137–138
  Theme 38
  Web Part 5
  Workflows 299
Gallery page 15
General tab (Application Options dialog box) 16
globally reusable workflows 253, 295–298
  Approval workflow 296
  Collect Feedback 296
  Collect Signatures 296
  creating 298–301
  errors 319
  WideWorldImporters Expense Approval
    modifying task forms 322–323
global master pages 370–371
global meeting workspace master pages 370–371
graphics
  Web Parts
    inserting 110–114
Group Approval template 251
grouping
  data in Data View 149–152
groups
  Controls
    inserting controls 460–463
    server controls 476–479
  Data
    controls 464
  Designers site 32
  editing 43
  Login
    controls 464
  Navigation
    controls 464
  Ribbon 14
  Site Owners 32
  Standard
    controls 464
  Validation
    controls 464
  Viewers site
    preventing access to sites 41–43
  Workflow tab 256
Group Work Site template 70

H

hexadecimal notation 412
Hide Content condition 159
hiding
  content 157–160
hierarchies (sites)
  creating 45–48
HiSoftware
  accessibility/compliance tools 425
Home.aspx page
  CSS Properties task pane 339
  Manage Styles task pane 339
home pages
  modifying 119–121
HTML
  controls 460
HTML pages
  creating 344–345
HTML tags
  CSS 331
  CSS styles 334
   337
  <p> tag 351
Hyperlink command 112
hyperlinks
  Web Parts
    inserting 110–114
Hyperlinks option 8
Hyperlinks task pane 27
  testing usability 415–417
hyphens
  URLs (Uniform Resource Locators) 13

I

IA (information architecture)
  designing prototypes 408–411
  testing usability 415–417
icons
  hiding content 157–160
  master page controls 372
  showing content 157–160
identifying
  CSS styles 333–338
  styles on content pages 339–341
IDs
  ASP.NET controls 467
  CSS 331
If Any Value Equals Value condition 481
If Current Item Field Equals Value condition 481
If Task Outcome Equals Value condition 482
illegal characters
  components 11

images
converting 110
thumbnails 110
uploading to Site Assets library 90–93
Web Parts
inserting 110–114
Impersonate Custom Identity authenticaton mode (BCS) 212
Impersonate Windows Identity authenticaton mode (BCS) 212
impersonation steps
workflows 256
implementing
UCD (user-centered design) methodology 402–403
Import dialog box 181–183, 360, 416
importing
data 76–77
workflows from Visio Premium 2010 281–283
Import Visio workflows 254
Import Workflow From Visio Drawing dialog box 282
Included Fields dialog box 178
InfoPath 2010
applications 309
InfoPath Designer 2010 309
adding association fields to initiation forms 319–322
modifying InfoPath forms 309–312
InfoPath Filler 2010 309
InfoPath forms 258
modifying 308–312
publishing 313–316
saving 313–316
information architecture. *See* IA
inheritance
CSS 356–360
Inherit List Item Parent Permissions action 487
Initiation Form Parameters command 258
initiation forms
adding association fields to 319–322
creating 301–305
modifying parameters 316–318
questions 302
retrieving values from 305–308
inline editing
Data Views 152–154
inline styles 340–341
Insert Formula And Condition dialog box 312
Insert Formula dialog box 164, 165, 166–168
Insert group (Workflow tab) 256
Insert Hyperlink dialog box 91, 113
Insert Picture dialog box 310
Insert Task action 489
installing
SharePoint Foundation 2010 504–507
instances
removing 285–287
workflows 252, 252–253
IntelliSense
adding CSS to Code view 359–362
Internet Explorer
security settings 18
Internet Explorer Developer toolbar 334
Internet sites
themes
cascading style sheets 40
Issue Tracking list
creating 72–74, 74–76

J

JavaScript
master pages 369
JobApplication list settings page 269
JobApplication_New Item dialog box 269–270
JobApplicationWorkflow
creating workflows 260–262
Join option
combining related data 197
Join Subview dialog box 201

K

keyboards
testing user accessibility 419
keyboard shortcuts
switching between tabs 23

L

labels
MyPage.aspx 343
PlaceHolderSiteName (Master) 339
Layers task pane 26
layouts
Web Part zones 132
layout tables 8
legislation
accessibility 418–423
maintaining compliance 423–426
copyright 424
Data Protection Act 424
European Commission Directive on Data Protection 424
licensing 424

legislation (*continued*)
Personal Information Protection and Electronic Documents Act (PIPEDA) 424
privacy laws 424
regulations 424
length
URLs (Uniform Resource Locators) 12
levels (permissions)
Approve 41
Contribute 41
Design 41
Full Control 41
Manage Hierarchy 41
Read 41
Restricted Read 41
View Only 41
LFWP (List Form Web Part) 126–130
libraries 4, 5, 14, 69. *See also* lists
associating workflows with 254–258
calculated columns 80–81
XPath expressions 165–168
content types
adding document templates to 101–103
adding site columns to 100–101
associating 103–104
creating 98–100
copying 74
creating 70–74
Wiki Page library 72–74
creating Association columns 293–294
data integrity
column validation 81–83
data sources 175
default settings, changing 76–77
formula columns 163–165
Pages 137, 438, 440–443
column types 438
removing workflows 285
security 88–89
Site Assets 137
adding XML files to 180–182
uploading images to 90–93
Site Collection Images 434
site columns 96–98
adding to content types 100–101
creating 94–96
Site Pages 137
All Pages view 386
tasks 71–75
wfpub
globally reusable workflows 296
workflows 5
Workflows 268–269
folders 268
XSLT List View (XLV) Web Part
creating 83–86
Libraries category 70
licensing 424
life cycles
user-centered design. See UCD methodology 402
LIM. *See* list item menu
Link Data Sources Wizard 199
linked sources 176, 197–201
links
Create Custom Content 339
Customization area 497–499
editing
adding to Data Views 152–153
e-mail 13
IA (information architecture)
testing usability 415–417
master page controls 372
Start Approval Process action 493
list actions 259
Add List Item Permissions 486
Check In Item 486
Check Out Item 486
Copy List Item 486
Create List Item 486
Declare Record 486
Delete Drafts 486
Delete Item 486
Delete Previous Versions 486
Discard Check Out Item 486
Inherit List Item Parent Permissions 487
Remove List Item Permissions 487
Replace List Item Permissions 487
Set Content Approval Status 487
Set Field in Current Item 487
Undeclare Record 487
Update List Item 487
Wait for Change in Document Check-Out Status 487
Wait for Field Change in Current Item 487
list columns 77–79
deleting 105–106
ListData.svc 190
List Form Web Part (LFWP) 126–130
List Information (list settings page) 71
list item menu
custom actions 89–93
lists 4, 5, 14, 69. *See also* libraries
associating reusable workflows with 290–292
calculated columns 80–81
XPath expressions 165–168
Common Content Tasks 390
content types
adding document templates to 101–103
adding site columns to 100–101

associating 103–104
creating 98–100
copying 74
creating 70–74
importing data from Excel 76–77
Issue Tracking list 72–74, 74–76
creating Association columns 293–294
creating connections 177–180
data integrity
column validation 81–83
data sources 175
default settings, changing 76–77
deleting 105–106
external 176, 209
creating 225–228
managing 225–228
SharePoint Workspace 228
form pages
creating 125–129
modifying 125–129
formula columns 163–165
modifying connections 177–180
permissions
remapping 88–89
removing workflows 285
security 88–89
settings
checking in browsers 75
site columns 96–98
adding to content types 100–101
creating 94–96
tasks 71–75
view pages
creating 123–125
modifying 121–123
XLV Web Parts 121–123
workflows 5
XSLT List View (XLV) Web Part
creating 83–86
Lists And Libraries gallery page 105
list settings page 71–72
Custom Actions 91
List Template gallery 70
list templates 70–74
list view page
creating 226–228
list workflows 254
deleting 285
list workflow templates 250–251
Log In As control 15
Login group
controls 464
Log to History List action 483
lookup columns 472
Lookup For Integer dialog box 274
Lookup For Person Or Group dialog box 262, 266
Lookup For String dialog box 262, 291
Lookup Manager of a User action 488
LucernePublishing.png 464

M

Main Web Part zone 121
Manage Content Regions dialog box 388, 389
Managed Metadata Service (MMS) 56
Manage group (Workflow tab) 256
Manage Hierarchy level 41
Manage Lists rights 41
Manage Styles task pane 26, 335, 339
managing
ContentPlaceHolder controls 387–391
data sources 173
ECTs 242–244
external lists 225–228
permissions 41–44
task panes 27–31
users 41–44
Web pages 137–140
mapping
ECTs to Office item types 222–225
workflows with Visio Premium 2010 277–281
Master Page gallery 443
permissions 443
master pages 14, 368–376
adding CSS to Code view 359–362
ASP.NET 368
attaching 134–136
ContentPlaceHolder controls 367
managing 387–391
controls 372–375
content placeholders 372
delegate 372
icons 372
links 372
menus 372
navigation components 372
scripts 372
copying 377–379
corev4.css 356–360
creating 130–132, 376
creating web pages from 391–395
customizing 377, 379–385
Data Views 369
default 367, 370–371
changing 385–386
global meeting workspace 370–371
minimal.master 370–371
publishing sites 371
v4.master page 370–371

master pages (*continued*)
exporting 395–396
global 370–371
identifying CSS styles 334–338
JavaScript 369
resetting to site definition 396–398
saving 377–379
Search box 369
Site Actions button 369
structure 369
style sheets 369
tags 369
testing usability 415–418
upgrading 393–395
v4.master 334
changing default master pages 385–386
copying 378–379
customizing 379–385
saving 378–379
visual aids 334, 374
Match Content Regions dialog box 135–136, 478
menus
master page controls 372
Merge option
combining related data 197
Message From Webpage dialog box 448
metadata
columns 77
Microsoft Business Connectivity Services team
associations 238
Microsoft client software
licenses 424
Microsoft Download Center
.NET Framework 250
Microsoft InfoPath dialog box 314
Microsoft Office applications
Access
creating linked tables 231–234
creating ECTs 222–225
ECTs 228–231
Microsoft Office Customization Installer dialog box 229
Microsoft PowerPoint
defining site relationships 408–409
Microsoft SharePoint 2010 Administrator's Companion 503
Microsoft SharePoint 2010 Administrator's Pocket Consultant, 503
Microsoft SharePoint Designer dialog box 42, 43, 44, 113, 396, 453
publishing process 269
Microsoft SharePoint Foundation 2010 start page 506
Microsoft SharePoint Foundation 2010 Step by Step 503
Microsoft SharePoint Foundation Data Retrieval Service 174
Microsoft SharePoint Workflow 277–281
Microsoft Visio 5
defining site relationships 408–409
Microsoft Visio dialog box 281
Mini gallery 15
minimal.master page 370–371
MMS (Managed Metadata Service) 56
Modified by a Specific Person condition 482
Modified in a Specific Date Span condition 482
Modify Field dialog box 316
Modify group (Workflow tab) 256
modifying. *See also* customizing
All Items view 121–123
CSS styles 349–353
form pages 125–129
home pages 119–121
InfoPath forms 308–312
initiation form parameters 316–318
list view pages 121–123
page layouts 447–449
task forms 322–323
text in Data Views 149–152
Web Parts 115–119
workflows 264–267
Modify Style dialog box 155, 157, 352
more-accessible mode 419
More Colors dialog box 412, 413
More Fields dialog box 383
Move Down command 264
Move Up command 264
multistep workflows
creating 273–276

N

names
URLs (Uniform Resource Locators) 11–13
namespaces 461
navigation components
master page controls 372
Navigation group
controls 464
Navigation pane 7, 14, 52–53
navigation (site)
card sorting 409
defining 408–409
.NET Framework 3.0
SharePoint Designer 250
New button
creating subsites 46–47
New dialog box 46, 63, 386
new features 6–8

NewForm.aspx 72, 126
New group
  Lists and Libraries tab 70
New Link—Webpage Dialog dialog box 437
New List View dialog box 124
New Page dialog box 435
New Publishing Site dialog box 432
New SharePoint Site 13
New Style dialog box 341, 347
New Web Part Page dialog box 392–396
Nielsen, Jakob
  usability checklist for designing prototypes 410–411
nodes 160
no-entry icon 24, 130
nonpublishing pages 130
NorthWind Customers list settings page 227
NotificationMessage variable 494

O

objects
  BCS 210
  deleting 105–106
Office applications
  Access
    creating linked tables 231–234
  creating ECTs 222–225
  ECTs 228–231
Office Fluent UI 3, 6
Office Sync For External List option 229
On Approval Canceled event (Task Process Behaviors page) 500
On Approval Completed event (Task Process Behaviors page) 501
On Approval Running event (Task Process Behaviors page) 500
On Approval Started event (Task Process Behaviors page) 499
one-to-many relationships
  associations 237–242
OneVoice for Accessible ICT Coalition 403–404
Only Allow Task Recipients And Process Owners To Read And Edit Workflow Tasks setting 496
On Stage view 14–16
  workspaces 18
On Task Assigning event 497
On Task Completed event 499
On Task Pending event 498
opening
  Web sites in SharePoint Designer 2010 17
Open SharePoint Site 13
Operation Completed Successfully page 62–65
Operation Properties page (Operations Wizard) 216
Operations Design view 212
  managing ECTs 242–244
Operations Wizard 216
Options dialog box 19, 22
organization
  sites 4
outcomes
  approval processes 496
Outlook
  external lists 229
owners 435–436
  site collections 32–33
  site themes 38

P

Page Content field control 438
Page content type 442
Page Editor Options dialog box 20, 21–25, 22, 111
  Authoring tab 330
  Color Coding tab 330
  configuring Code view 21–25
  configuring Design view 21–25
  CSS tab 329
  setting CSS options 329–333
Page Layout And Site Template Settings page 508
Page layout designers 435
Page Layout gallery 444
page layouts 130, 430, 440–443
  approving 451–452
  content types 442–443
  creating 442–447
  detaching 454–456
  field controls 434, 439
  modifying 447–449
  reattaching 454–456
  restoring 453–454
  testing usability 415–418
pages 20–25
  Add A Workflow 299
  All Files gallery 74
  ASP.NET
    attaching master pages 134–136
    creating 130–132
    creating from master pages 391–395
    inserting Web Part zones 132–135
  Columns Editor 106
  Configuration Successful 506
  content
    content placeholders 387–391
    identifying styles on 339–341
    linking with master pages 391–395

pages (*continued*)
Content Types gallery 100
CreateDVWP 145
Create Site Collection 507
customized 21
Data Sources gallery 173, 183–184, 186, 193, 198
creating data connections 177–180
database connections 193
dynamically created definitions 177
modifying data connections 177–180
DataSourceTest.aspx 183–184, 186, 193, 198
default 20
definition
resetting 49–52
dirty pages 112
editing
safe mode 21
editor 20
Expenses settings 101
External Content Type settings 213
External Content Types gallery 213, 231
creating external lists 226–228
field controls 438
Filter Parameters (Operations Wizard) 216
HTML
creating 344–345
JobApplication list settings 269
Lists And Libraries gallery 105
list settings 71–72
Custom Actions 91
list view
creating 226–228
managing task panes 27–31
master 368–376
ASP.NET 368
ContentPlaceHolder controls 367, 387–391
controls 372–375
copying 377–379
corev4.css 356–360
creating 376
creating web pages from 391–395
customizing 377, 379–385
default 367, 370–371
exporting 395–396
global 370–371
identifying CSS styles 334–338
JavaScript 369
resetting to site definition 396–398
saving 377–379
Search box 369
Site Actions button 369
structure 369
style sheets 369
tags 369
testing usability 415–418
upgrading 393–395
v4.master 334
visual aids 334, 374
Microsoft SharePoint Foundation 2010 start 506
nonpublishing 130
NorthWind Customers list settings 227
Operation Properties (Operations Wizard) 216
Page Editor Options dialog box 21–25
Page Layout And Site Template Settings 508
Parameters Configuration 223
Parameters (Operations Wizard) 216
PlaceHolderMain 21
profile
creating 233–237
publishing 130, 430
approvers 435
rating functionality 449–451
requesting 439–440
Remove Workflows 286
Reset Page To Site Definition Version 50
Return Parameter Configuration 241
Run Configuration Wizard 506
Service Applications 510
settings
displaying 54
Site Assets gallery 476
Site Content and Structure 45
Site Master Page Settings 371
site settings
views 20
System Master Page 371
Task Process Behaviors
events 499–501
testing 114
unghosted 21
viewing task panes 27–31
web
creating from master pages 391–395
Web Part
inserting Web Part zones 132–135
Web Parts 21
inserting hyperlinks 110–114
inserting images 110–114
inserting ScreenTips 110–114
inserting text 110–114
tables 131
Welcome 119–121
Welcome to SharePoint Products 506
Wiki 21
CreateDVWP 145
tables 131
Workflow Settings 257, 290, 292, 301
creating workflows 253–258

Pages library 137, 438, 440–443
  column types 438
parallel blocks (actions) 259
  creating 260–262
parameters
  initiation form 316–318
Parameters Configuration page 223
Parameters page (Operations Wizard) 216
parent sites
  subsites
    changing permissions 41–44
Pause for Duration action 484
Pause Until Date action 484
People Picker icon 42
permissions 8
  Add And Customize
    creating profile pages 234
  ECTs 510–511
  levels
    Approve 41
    Contribute 41
    Design 41
    Full Control 41
    Manage Hierarchy 41
    Read 41
    Restricted Read 41
    View Only 41
  lists
    remapping 88–89
  managing 41–44
  Master Page gallery 443
  resources 44
  rights
    Apply Themes and Borders 41
    Create Subsites 41
    Delete Items 41
    Manage Lists 41
  subsites
    changing 41–44
  workflow impersonation steps 256
Permissions area (files settings page) 137
Permissions column 42
personal health information (PHI) 425
Personal Information Protection and Electronic Documents Act (PIPEDA) 424
personally identifiable information (PII) 425
personas
  user requirement documents 404–405
Person Is a Valid SharePoint User condition 482
PHI (personal health information) 425
Picture dialog box 157
Picture Properties dialog box 423
PII (personally identifiable information) 425
PIPEDA (Personal Information Protection and Electronic Documents Act) 424
PlaceHolderBodyAreaClass content placeholder 395
PlaceHolderMain 21
PlaceHolderMain (Custom) control 454
PlaceHolderQuickLaunchBottom content placeholder 394
PlaceHolderQuickLaunchTop content placeholder 394
placeholders (content)
  managing 387–391
  PlaceHolderBodyAreaClass 395
  PlaceHolderQuickLaunchBottom 394
  PlaceHolderQuickLaunchTop 394
  PlaceHolderTitleAreaClass 395
PlaceHolderSiteName (Master) label 339
PlaceHolderTitleAreaClass content placeholder 395
Please Wait dialog box 433
portal sites
  themes
    cascading style sheets 40
practice files xxiii–xxiv
  exercises xxvii–xxviii
practice sites
  deleting xxx
Presentation area (BCS) 209
presentation layer
  creating 460–463
preview functionality (SharePoint Designer) 406
Preview In Multiple Browsers option 347
primary key field 237
privacy laws
  sites 424
Problem Details dialog box 422
processes
  solutions 5
  workflows 252
Products data source 199
Profile Page Creation dialog box 235
profile pages
  creating 233–237
  ECT host, configuring 511–512
Project Page content type 442
properties
  controls 461
  CSS 331
prototypes
  designing 408–411
    checklist 410–411
prototyping
  solutions 5
<p> tag 351
publishing 40
  InfoPath forms 313–316
  workflows 267–273, 269–274

Publishing Approval template 251
Publishing feature (SharePoint Server) 431
publishing pages 130, 430
  approvers 435
  rating functionality 449–451
  requesting 439–440
Publishing Portal site template 431
publishing sites
  column types 443
  creating 431–434
  Page library 137
  Pages library 438
Publishing site template
  creating subsites 431–433

Q

questions
  initiation forms 302
Quick Access Toolbar 14
Quick Publish command
  publishing InfoPath forms 313–316
Quick Tag Selector 23

R

RangeValidator control 469
ranking content (searches) 38
rating functionality
  SharePoint Server 2010 449–451
readability
  URLs (Uniform Resource Locators) 12
Read level 41
Read List operation
  changing filter criteria 242–244
Read List Wizard 243
Really Simple Syndication (RSS) feeds 176
Reassignment setting 497
Reassign Task action 489
Recent Sites 13
Redirect Page content type 442
referential integrity
  associations 238
RegularExpressionValidator control 469
regulations 424
relational actions 260
  Lookup Manager of a User 488
relationships
  one-to-many
    associations 237–242
  tables 238
Remove List Item Permissions action 487
Remove Workflows page 286
removing
  workflows 285–287
  WSP solution file xxix–xxx
Replace List Item Permissions action 487
reports
  CSS 362–364
Reports, Navigation option 8
Representational State Transfer (REST) 190–192
Request a Change action 489
RequiredFieldValidator control 466, 468, 469
requirements
  compatibility
    UCD methodology 404–407
  system requirements
    client computer xxv
    client software xxvi
    server computer xxvi–xxvii
  user
    personas 404–405
    UCD methodology 404–407
    usage cases 404
    usage scenarios 404
Rescind Task action 489
Reset Page To Site Definition Version page 50
Reset To Site Definition command 397
Reset To Site Definition dialog box 50
resources
  permissions 44
restoring
  files 138–140
  page layouts 453–454
REST (Representational State Transfer) 190–192
Restricted Read level 41
restrictions 8
  SharePoint Designer 2010
    at Web application level 508–509
REST services 176
  connecting to 190–192
  ExcelRest.aspx 190
  ListData.svc 190
retrieving
  data
    from external systems 211
  values from initiation forms 305–308
Return Parameter Configuration page 241
Return To The Workflow link 497
reusable workflows 254
  associating with lists 290–292
  creating 290–292
  creating Association columns 293–294
  errors 319

globally reusable workflows 295–298
Approval workflow 296
Collect Feedback 296
Collect Signatures 296
creating 298–301
saving as .wsp files 294–295
ribbon 14
creating subsites 46–47
Ribbon group 14
rights
Apply Themes and Borders 41
Create Subsites 41
Delete Items 41
Manage Lists 41
Rights Mask
custom actions 90
root sites
creating globally reusable Approval workflows 296–298
creating globally reusable workflows 298–301
RSS feeds
connecting to XML files 183–184
server-side scripts 185–187
RSSLink control 477
RSS (Really Simple Syndication) feeds 176
rules
CSS
adding to Code view 359–362
CSS styles 335
HTML tags 334
workflows 258
Rules task pane 312
Run Configuration Wizard page 506

S

safe mode 21
Save As dialog box 314
Save group (Workflow tab) 256
Save This Username And Password In The Data Connection option (Data Source Properties dialog box) 185
Save Web Part To Site Gallery dialog box 169
saving
content types 103
ECTs 222
InfoPath forms 313–316
master pages 377–379
reusable workflows as .wsp files 294–295
sites 8
site templates 60–64
SBSSPDPracticeSite_Starter.wsp 177–180, 254–258, 373
Schedule Web Analytics Alerts template 251
Schedule Web Analytics Reports template 251
screen-reader software
testing user accessibility 420
ScreenTips
Web Parts
inserting 110–114
ScriptLink control 477
scripts
master page controls 372
server-side
RSS feeds 185–187
Search box
master pages 369
searches
enterprise 38
ranking content 38
Section 508, Voluntary Product Accessibility Templates (VPATs) 418
secure sensitive information (SSI) 425
Secure Store Service (SSS) 211
security
Internet Explorer 18
libraries 88–89
lists 88–89
sites 41
Select A Connection Definition File dialog box 232
Select A Field Or Group dialog box 321
Select a Master Page dialog box 392
Select A Master Page dialog box 135
selectors
CSS 331
Select Style Sheet dialog box 342, 347
Select Task Process Participants dialog box 493
Select Users dialog box 262, 266
Select XML File dialog box 465
Send an Email action 484
Send a Task Notification Email action 489
Send Document Set to Repository action 485
Send Document to Repository action 484
Send Document to Repository category (core actions) 259
sequence numbers 89–91
serial actions (workflows) 259
server computer
requirements xxvi–xxvii
server controls 476–479
AspMenu 477
ASP.NET 460, 464–466
CssLink 477
RSSLink 477
ScriptLink 477
SPCalendarNavigation 477
Theme 477

Server Error dialog box 195
server ribbon custom actions 89, 93–95
server-side scripts 176
  RSS feeds 185–187
server sites
  enabling site templates 507
Service Applications page 510
services
  REST 176
    connecting to 190–192
    ExcelRest.aspx 190
    ListData.svc 190
  SOAP 176
    connecting to 188–190
  Web
    BCS 212
Set Content Approval Status action 487
Set Content Approval Status (as author) action 489
Set Content Approval Status for the Document Set action 485
Set Field in Current Item action 487
Set Hyperlink ScreenTip dialog box 112
Set Task Field action 489
Set Time Portion of Date/Time Field action 484
Settings area
  creating approval processes 496–497
Settings area (Workflow Settings page) 257
settings page
  displaying 54
Settings page 15
Set Workflow Status action 484
Set Workflow Status category (core actions) 259
Set Workflow Variable action 484
shapes
  Visio Premium 2010 283
Shapes pane (Visio) 279
Shared Documents 54
Shared Documents dialog box 118
SharePoint 2010 Central Administration Web site 209
  creating profile pages 233
SharePoint controls 460
SharePoint Designer
  creating profile pages 233
SharePoint Designer 2010 1
  cascading style sheet task panes 328
  Compatibility task pane
    testing site compatibility 406–407
  creating workflows 253–258
  Hyperlinks task pane
    testing usability 415–417
  .NET Framework 3.0 250
  new features 6–8
  preview functionality 406
  restrictions at Web application level 508–509
  versions 3
  Web safe color palette
    testing color accessibility 412–414
SharePoint Designer windows 47
SharePoint Foundation
  permission levels 41
  versioning 377
SharePoint Foundation 2010 1, 7
  Authentication section 195
  configuring 504–507
  installing 504–507
  libraries 70
  lists 70
SharePoint Products and Technologies 3
SharePoint Products Configuration Wizard 506–507
SharePoint Server
  permission levels 41
  versioning 377
SharePoint Server 2010 1
  creating profile pages 233–237
  ECM 429
  libraries 70
  lists 70
  Publishing feature 431
  rating functionality 449–451
  WCM 429
  Web content management 430, 433–437
    creating publishing sites 431–434
SharePoint Server Publishing feature 40
SharePoint Server Publishing Infrastructure feature 40
SharePoint Workflow Actions 277–281
SharePoint Workflow Conditions 277–281
SharePoint Workflow Terminators 277–281
SharePoint Workspace
  external lists 228
Shipments.xml 180–182
shortcut keys
  switching between tabs 23
Show Column Totals Per Group option 150
Show Content condition 159
showing
  content 157–160
SilverlightSPDSBS.xap file 115
Silverlight Web Part dialog box 116
Site Actions button
  master pages 369
Site Assets gallery
  file settings page 137–138
Site Assets gallery page 476
Site Assets library 137
  adding XML files to 180–182
  uploading images to 90–93
Site Collection Administration section 33–34
Site Collection Images library 434

site collections 9
administrators 32
content types
creating 98–100
creating 506–507
opening subsites 444
owners 32–33
publishing 40
Publishing feature (SharePoint Server) 431
root sites
creating globally reusable Approval workflows 296–298
creating globally reusable workflows 298–301
Site Collection Images library 434
site columns 56, 96–98
adding to content types 100–101
adding to page layout content types 449–451
content types
creating 98–100
creating 94–96
Site Columns Picker dialog box 97, 101, 450
Site Content and Structure page 45
site definition
resetting master pages to 396–398
site definition pages
resetting 49–52
Site Definition Page Warning dialog box 390, 397
site definitions 9, 61
Site Master Page Settings page 371
Site Owners group 32
Site Pages gallery
file settings page 137–138
Site Pages library 137
All Pages view 386
sites
accessibility legislation 418–421
accessing 52
branding 327
adding CSS to Code view 359–362
attaching CSS files 340–343
creating CSS files 340–343
creating HTML pages 344–345
creating styles 346–349
CSS inheritance 356–360
CSS reports 362–364
deleting styles 349–353
designing for accessibility 411–414
identifying CSS styles 333–338
identifying styles on content pages 339–342
modifying styles 349–353
Style Application group commands 353–355
text 328
child 9, 431
site columns 94
style inheritance 356
collections
creating child sites 45–48
components
navigating 56
controls 24
copyrights 424
creating 8–12
from site templates 61–64
from WSP solution file xxix
customized
upgrading 51–52
customizing 3
solutions 6
deleting 48–49
descriptions 38–40
exploring 52–55
Foundation
searches 38
groups
editing 43
hierarchies
creating 45–48
home pages
modifying 119–121
IA (information architecture)
designing prototypes 408–411
licensing 424
maintaining 435–436
navigation
card sorting 409
defining 408–409
organizing 4
owners 435–436
themes 38
page layouts 430, 440–443
approving 451–452
content types 442–443
creating 442–447
detaching 454–456
modifying 447–449
reattaching 454–456
restoring 453–454
pages 20–25
practice
deleting xxx
presentation layer
creating 460–463
privacy laws 424
publishing 40
column types 443
creating 431–434
default master pages 371
Pages library 438
regulations 424

sites (*continued*)
root
creating globally reusable Approval workflows 296–298
creating globally reusable workflows 298–301
saving 8
searches
ranking content 38
security 41
server
enabling site templates 507
SharePoint sites compared to non-Sharepoint sites 3
subsites 9
changing permissions 41–43
creating 431–434
creating with Team Site template 9–10
opening in site collections 444
team. ***See*** team sites
templates 8
resetting 49–52
testing accessibility 418–421
Accessibility task pane 421–423
checklist 420–421
maintaining compliance 423–426
testing compatibility 406–407
themes
cascading style sheets 40
changing 38–40
colors 39
fonts 39
titles 38–40, 47
top level 9
Team Site template 45
URLs (Uniform Resource Locators)
modifying 39
variations 430
wideworldimporters 10
Site Settings dialog box 8
site settings page
views 20
site templates
ceating 61–64
creating child sites 45–48
enabling on SharePoint server sites 507
Enterprise Search Center 431
Publishing
creating subsites 431–433
Publishing Portal 431
saving 60–64
solutions 60
SPDSBS_Sites 63
Visio Process Repository 70
Site Templates 13
Site To Load Templates From dialog box 432
site workflows 254
creating 275–277
site workflow templates 251–252
SOAP services 176
connecting to 188–190
solutions 4, 5
creating sites 8–12
customizing sites 6
prototyping 5
saving sites 8
site templates 60
.wsp files 60
Solutions Gallery: Upload Solution dialog box xxviii
solution WSP file
creating sites from xxix
removing xxix–xxx
uploading xxviii–xxix
Sort And Group dialog box 124, 149, 161, 228
sort expressions
adding 161–163
sorting
data in Data View 149–152
SPCalendarNavigation control 477
SPDataSource control 152, 472, 473
SPD SBS Job Application workflow
creating initiation forms 303–305
modifying association forms 318–319
modifying initiation form parameters 316–318
retrieving values from initiation forms 305–308
SPDSBSPracticeSite_Starter.wsp
creating Data Views 145–149
SPDSBS_Sites site template 63
Split Cells dialog box 128
Split view 20
SQL Server
authentication 176
BCS components 210
creating external data sources 212–215
database connections 192–198
licenses 424
SQL Server Compact Edition 229
SQL Server Connection dialog box 214
SSI (secure sensitive information) 425
SSS (Secure Store Service) 211
Standard group
controls 464
Start Approval Process action 488, 491
customizing workflows 493–494
Start Custom Task Process action 260, 488
Start Document Set Approval Process action 485, 491
Start Feedback Process action 488, 494
Start Options area (Workflow Settings page) 257, 272

static Web Parts 115
status bar 15, 23
statuses
  visual aids 23
stencils
  Shapes pane (Visio) 279
steps (workflows) 273
Stock.aspx 154–155, 157–159, 164–165, 169–170
Stop Workflow action 484
String Builder dialog box 291, 306, 307
Style Application group commands 353–355
styles
  CSS 331, 332–333
    creating 346–349
    deleting 349–353
    identifying 333–338
    identifying on content pages 339–341
    inline 340–341
    Manage Styles task pane 335
    modifying 349–353
    rules 334, 335
_styles folder 358
style sheets
  master pages 369
Style tab 341
subsites 9
  creating 431–433
  creating with Team Site template 9–10
  opening in site collections 444
  permissions
    changing 41–44
Summary view
  ECTs 216
  managing ECTs 242–244
switching
  between tabs 23
symbols
  no-entry 130
System Master Page 371
system requirements
  client computer xxv
  client software xxvi
  server computer xxvi–xxvii

T

tables
  layout tables 8
  relationships 238
  Web Part pages 131
  Wiki pages 131
tabs
  switching between 23
Tag Properties task pane 26, 468
  inserting controls 460–463
tags

    inserting Web Part zones 131
  master pages 369
  WebPartPagesSilverlightWebPart 116
  XML 159–160
tags (HTML)
  CSS 331
  HTML
    CSS styles 334
     337
  <p> tag 351
task actions 260
  Assign a Form to a Group 488
  Assign a To-do Item 488
  Collect Data from a User 488
  Start Approval Process 488, 491
    customizing workflows 493–494
  Start Custom Task Process 488
  Start Feedback Process 488, 494
task behavior actions
  Append Task 489
  Delegate Task 489
  End Task Process 489
  Escalate Task 489
  Extract Substring from End of String 490
  Extract Substring from Index of String 490
  Extract Substring from Start of String 490
  Extract Substring of String from Index with Length 490
  Find Interval Between Dates 490
  Forward Task 489
  Insert Task 489
  Reassign Task 489
  Request a Change 489
  Rescind Task 489
  Send a Task Notification Email 489
  Set Content Approval Status (as author) 489
  Set Task Field 489
  Wait for Change in Task Process Item 489
  Wait for Deletion in Task Process Item 489
Task Form Fields area
  creating approval processes 495
task forms
  collecting information 495
  modifying 322–323
Task Outcomes area
  creating approval processes 496
task panes 15, 26–31. *See also* individual names of
  Accessibility 26
  Apply Styles 26
  Behaviors 26
  Clip Art 27

task panes (*continued*)
Clipboard 27
Compatibility 27
Conditional Formatting 26
CSS Properties 26
CSS Reports 27
Data Source Details 26
Find 1 26
Find 2 26
Hyperlinks 27
Layers 26
Manage Styles 26
managing 27–31
Tag Properties 26
Toolbox 26
viewing 27–31
Task Process Behaviors page
events 499–501
tasks
workflows 253
tasks lists
All Items view
modifying 121–123
Tasks section 270
team sites
adding editing links to Data Views 153–154
adding Web Parts 115–119
attaching master pages 135–137
changing home page 120–121
conditional formatting 154–155
creating ASP.NET pages 131–134
creating list form pages 126–129
creating list view pages 123–125
creating new pages 111–114
deleting Web Parts 115–119
hiding content 157–159
managing files 138–140
modifying All Items view 121–123
modifying Web Parts 115–119
showing content 157–159
XPath expressions 166–168
Team Site template 13, 45
creating subsites 9–10
Telerik
accessibility/compliance tools 425
TEMPLATE folder 9–10
templates 8
Blank Site, Blog 13
document
adding to content types 101–103
Edit
inline editing 152–154
Enterprise Search Center site 431
Group Work Site 70
list 70–74
Publishing Portal 431
Publishing site
creating subsites 431–433
resetting 49–52
site
ceating 61–64
creating child sites 45–48
enabling on SharePoint server sites 507
saving 60–64
solutions 60
Visio Process Repository 70
Team Site 13, 45
creating subsites 9–10
workflow 250–252, 252, 294–295
Approval 491, 493–494
list 250–251
site 251–252
testing
accessibility 418–423
Accessibility task pane 421–423
checklist 420–421
maintaining compliance 423–426
ASP.NET forms 475–476
color accessibility 412–414
pages 114
site compatibility 406–407
usability 414–417
workflows 269–274
text
branding sites 328
modifying in Data Views 149–152
Web Parts
inserting 110–114
Text Box Properties dialog box 311, 319
TheByCountry.aspx page 227
The File Size in a Specific Range Kilobytes condition 482
The File Type Is a Specific Type condition 482
Theme control 477
Theme gallery 38
themes
cascading style sheets 40
changing 38–40
colors 39
fonts 39
These Users link (Start Approval Process action) 493–494

third-party tools
accessibility 425–426
compliance 425–426
thumbnails 110
Times New Roman 22
title bar 13
Title Field Contains Keywords condition 482
titles
sites 47
Web Part zones 132
titles (sites)
changing 38–40
toolbars
Internet Explorer Developer 334
Toolbox task pane 26
server controls 476–479
Tools area (BCS) 209
top level sites 9
Team Site template 45
Tracking category 70
Translation Management template 251

U

UCD methodology
402
accessibility legislation 418–421
compatibility requirements 404–407
designing prototypes 408–411
implementing 402–403
testing accessibility 418–421
testing usability 414–417
user requirements 404–407
UDC (Universal Data Connection) 177
UIs (user interfaces)
accessing sites 52
Office Fluent 3, 6
Undeclare Record action 487
unghosted pages 21
Unicode (UTF-8) language 22
Uniform Resource Locators (URL)
modifying 39
Uniform Resource Locators (URLs) 9
dashes 13
hyphens 13
length 12
names 11–13
readability 12
wideworldimporters 10
Universal Data Connection (UDC) 177
Untitled_1.aspx 461
Update List Item action 487
upgrading
customized sites 51–52
master pages 393–395
uploading
WSP solution file xxviii–xxix
URLs (Uniform Resource Locators) 9
dashes 13
hyphens 13
length 12
modifying 39
names 11–13
readability 12
wideworldimporters 10
usability 401
best practices 403
checklist for designing prototypes 410–411
testing 414–417
UCD methodology
implementing 402–403
usage scenarios
user requirement documents 404
use cases
user requirement documents 404
User Account Control dialog box 507, 509, 510
user-centered design. *See* UCD methodology
user data entry
validating 466–468
user-defined workflows 249
disabling 511–512
enabling 511–512
user interfaces (UI)
accessing sites 52
Office Fluent 3, 6
user requirements
personas 404–405
UCD methodology 404–407
usage cases
404
usage scenarios 404
users
managing 41–44
User's Identity authenticaton mode (BCS) 212
Use Single Sign-On Authentication option 195
Use Single Sign-On Authentication option (Data Source Properties dialog box) 185
Use Windows Authentication option (Data Source Properties dialog box) 185
utility actions 260

V

v4.master 334, 370–371
  changing default master pages 385–386
  copying 378–379
  customizing master pages 379–385
  saving 378–379
validating
  columns 81–83
  user data entry 466–468
  workflows 269–274
validation controls
  ASP.NET 468–470
    CompareValidator 468
Validation group
  controls 464
ValidationSummary control 469
value pairs 332
values
  retrieving from initiation forms 305–308
variables
  Approval workflow template 493–494
  Approvers 494
  CancelonChange 494
  DueDateforAllTasks 494
  NotificationMessage 494
Variables group (Workflow tab) 256
variations 430
Verify Hyperlinks dialog box 417
Version History area (files settings page) 137
versioning
  SharePoint Foundation 377
  SharePoint Server 377
versions 3
View controls 464
View dialog box 94
Viewers site group
  preventing access to sites 41–43
viewing
  task panes 27–31
  XML file content with Data Source Details task pane 180–182
View Only level 41
view pages
  list
    creating 123–125
    modifying 121–123
    XLV Web Parts 121–123
views
  All Items
    modifying 121–123
  All Pages
    Site Pages library 386
  Approval.xsn form 491
  Code 20, 21, 25
    adding CSS rules to 359–362
    configuring with Page Editor Options dialog box 21–25
    XSLT 165–168
  Data 143
    conditional formatting 154–157
    creating 144–149
    customizing 149–152
    database connections 192–198
    data entry 152–154
    filtering 176
    formula columns 163–165
    grouping data in 149–152
    hiding content 157–160
    inline editing 152–154
    master pages 369
    modifying text in 149–152
    reusing 168–170
    showing content 157–160
    sorting data in 149–152
    XSLT 144
  Design 20, 25
    configuring with Page Editor Options dialog box 21–25
  On Stage 14–16
    workspaces 18
  Operations Design 212
    managing ECTs 242–244
  Split 20
  Summary
    ECTs 216
    managing ECTs 242–244
Views (list settings page) 71
Visio 2010
  workflows 7
Visio Premium 2010
  actions 283
  conditions 283
  exporting workflows to drawings 283–284
  importing workflows from 281–283
  mapping workflows 277–281
  shapes 283
Visio Process Repository site template 70

visitors 435
visual aids 334
  master pages 334, 374
  status 23
Visual Aids command 374
voice recognition software
  testing user accessibility 420
VPATs (Section 508, Voluntary Product Accessibility Templates) 418
.vwi file 278
  exporting workflows 283–284

W

W3C (World Wide Web Consortium) 22, 403
  colors 412, 418
  WCAG (Web Content Accessibility Guidelines) 418
Wait for Change in Document Check-Out Status action 487
Wait for Change in Task Process Item action 489
Wait for Deletion in Task Process Item action 489
Wait for Field Change in Current Item action 487
WCAG (Web Content Accessibility Guidelines) 418
WCM. *See* Web Content Management
Web applications 9
  restrictions of SharePoint Designer 2010 508–509
WebBots 8
Web browsers 4
  accessing sites 52
  compatibility 405–406
  deleting workflows 285–287
  editing Web content 110
  inline editing 152–154
  Internet Explorer
    security settings 18
  library tasks 71–75
  list definitions 70
  list settings 75
  list tasks 71–75
  settings
    Web Part zones 132
  starting site workflows 276–277
  testing pages 114
Web Content Accessibility Guidelines (WCAG). *See* WCAG
Web Content Management 430, 433–437
  creating publishing sites 431–434
Web pages
  managing 137–140
Web Part Connections Wizard 202
Web Part gallery 5
WebPartPages:DataFormWebPart control 380, 382
WebPartPagesSilverlightWebPart tag 116
Web Parts
  Business Data Related List
    associations 237
  closed Web Parts 119
  compared to controls 459
  connecting 5, 202–205
  Content Editor Web Part (CEWP)
    resetting 49
  creating pages
    inserting Web Part zones 132–135
  Data
    master pages 369
  Data Form 5
  Data Views 5, 143
    conditional formatting 154–157
    creating 144–149
    customizing 149–152
    database connections 192–198
    data entry 152–154
    filtering 176
    formula columns 163–165
    grouping data in 149–152
    hiding content 157–160
    inline editing 152–154
    modifying text in 149–152
    reusing 168–170
    showing content 157–160
    sorting data in 149–152
    XSLT 144
  deleting 115–119
  deploying 168–170
  DFWP (Data Form Web Part) 115
    creating list form pages 126
  DVWP (Data View Web Part). *See also* Data Views
    adding to master pages 379–385
  dynamic 115
  hyperlinks
    inserting 110–114
  images
    inserting 110–114
  LFWP (List Form Web Part) 126–130
  modifying 115–119
  pages 21
    tables 131
  ScreenTips
    inserting 110–114

Web Parts (*continued*)
static 115
text
inserting 110–114
XLV 114
adding editing links to 152–153
conditional formatting 154–157
list view pages 121–123
reusing 168–170
XSLT List View (XLV) 83–88
creating 83–86
customizing 86–87
zones
Data Views 144
 131
frame styles 132
inserting 132–135
inserting Web Parts into 132–135
layouts 132
Main 121
settings 132
titles 132
Web Part Zone Properties dialog box 133
Web safe color palette
testing color accessibility 412–414
Web Service Description Language (WSDL) 188
Web services
BCS 212
XML Web services 5
Web sites
Central Administration 8
Channel 9 313
opening in SharePoint Designer 2010 17
SharePoint 2010 Central Administration 209
creating profile pages 233
WebUIValidation.js 469
Welcome page 119–121
Welcome Page content type 443
Welcome to SharePoint Products page 506
wfpub library
globally reusable workflows 296
WF (Windows Workflow Foundation) 250
WideWorldImporter.png 464
WideWorldImporters Expense Approval globally reusable workflow
modifying task forms 322–323
wideworldimporters site 10
Wiki Page library
creating 72–74
Wiki pages 21
CreateDVWP 145
tables 131
windows
SharePoint Designer 47
Windows dialog box 461
Windows Security dialog box 44
Windows Server
licenses 424
Windows Workflow Foundation (WF) 250
wizards
Association 239–243
Database Interface 8
Link Data Sources 199
Operations 216
Read List 243
SharePoint Products Configuration 506–507
Web Part Connections 202
workflow
SPD SBS Job Application
modifying association forms 318–319
workflow editor 5
creating workflows 253–258
Workflow editor page
modifying workflows 264–267
Workflow Error dialog box 512
Workflow Errors Found dialog box 267–273
Workflow Form Update Required dialog box 317
Workflow Foundation (WF) 250
Workflow History section 270
Workflow Information area (Workflow Settings page) 257
workflows 5, 7, 14
actions 258–264
Collect Data from a User 267
core 259, 483–484
creating 260–262
Document Set Actions 259
List Actions 259
parallel blocks 259, 260–262
Relational Actions 260
serial 259
Start Custom Task Process 260
Task Actions 260
Utility Actions 260
Visio Premium 2010 283
activities 258
Approval
content pages 429
associating with libraries 254–258
collecting information from users on startup 258
conditions 258–264
creating 260–262
steps 273
Visio Premium 2010 283

creating association forms 301–305
creating initiation forms 301–305
creating with SharePoint Designer 253–258
custom actions 89–93
custom activities 260
customizing
Start Approval Process action 493–494
deleting 285–287
deploying 267–273, 269–274
Else branch 273
exporting to Visio drawings 283–284
globally reusable workflows 253
295–298
creating 298–301
impersonation steps 256
importing from Visio Premium 2010 281–283
Import Visio 254
instances 252, 252–253
removing 285–287
list 254
deleting 285
mapping with Visio Premium 2010 277–281
modifying 264–267
multistep
creating 273–276
processes 252
publishing 267–273, 269–274
removing 285–287
reusable 254
associating with lists 290–292
creating 290–292
creating Association columns 293–294
errors 319
saving as .wsp files 294–295
rules 258
shapes
Visio Premium 2010 283
site 254
creating 275–277
steps 273
tasks 253
templates 250–252, 252
list 250–251
site 251–252
testing 269–274
user-defined 249
disabling 511–512
enabling 511–512
validating 269–274
Workflow Settings dialog box 513
Workflow Settings page 257, 290, 292, 301
creating workflows 253–258
Forms area 272
modifying workflows 264–267
Start Options area 272
Workflows gallery 299
Workflows library 268–269
folders 268
Workflows (list settings page) 72
Workflow tab 256
Check For Errors command 267
Workflow Task dialog box 271
workflow templates 294–295
Approval 491
variables 493–494
workflow.vdx 278
Workflow Visualization section 270
workflow.xoml 278
workflow.xoml.rules 278
worksheets (Excel)
creating lists 72–74
importing data to create lists 76–77
workspaces 15
Code view 25
Design view 25
global meeting workspace master pages 370–371
On Stage view 18
Shared Documents 54
site settings page 20
workstations
conditions 481–482
Created By a Specific Person 482
Created in a Specific Date Span 482
If Any Value Equals Value 481–482
If Current Item Field Equals Value 481
If Task Outcome Equals Value 482
Modified by a Specific Person 482
Modified in a Specific Date Span 482
Person Is a Valid SharePoint User 482
The File Size in a Specific Range Kilobytes 482
The File Type Is a Specific Type 482
Title Field Contains Keywords 482
World Wide Web Consortium (W3C) 22, 403
colors 412
Web Content Accessibility Guidelines (WCAG) 418
WSDL (Web Service Description Language) 188
.wsp files 60, 61
moving workflows between sites 283–284
saving reusable workflows as 294–295
WSP solution file
creating sites from xxix
removing xxix–xxx
uploading xxviii–xxix

X

XLV Web Parts 83–88, 114
  adding editing links to 152–153
  conditional formatting 154–157
  creating 83–86
  customizing 86–87
  list view pages 121–123
  reusing 168–170
XML 159–160
  data
    retrieving with server-script connections 185–187
  files 176
    RSS feed connections 183–184
  tags 159–160
  XSLT 160–163
XML File Connection command 183
XML files
  adding to Site Assets library 180–182
XML Path Language (XPath) 160
XML Web services 5
  connecting to SOAP services 188–190
.xoml file 268
.xoml.rules file 268
.xoml.wfconfig.xml file 268
XPath Expression Builder
  formula columns 163–165
XPath Expression Builder dialog box 164
XPath expressions 165–168
XPath (XML Path Language) 160
XSLT 143, 160–163
  adding sort expressions 161–163
  Code view 165–168
  Data Views 144
  XML 160–163
XSLT editor
  adding sort expressions 161–163
XsltListViewWebPart control 145
XSLT List View (XLV) Web Part 83–88
  creating 83–86
  customizing 86–87
.xsn 268

Z

zones (Web Parts)
  browser settings 132
  Data Views 144
   131
  frame styles
    132
  inserting 132–135
  inserting Web Parts into 132–135
  layouts 132
  Main 121
  titles 132

About the Author

Penelope Coventry is a Microsoft Most Valuable Professional (MVP) for Microsoft SharePoint Server and an independent consultant based in the United Kingdom, with more than 30 years of industry experience. She currently focuses on the design, implementation, and development of SharePoint technology–based solutions. She has worked with SharePoint since 2001. Most recently, she has worked for the international financial services group Aviva PLC, the U.K. Parliament, and the ATLAS U.K. defense consortium, as well as provided consultancy services to Microsoft Gold partners ICS Solutions and Combined Knowledge. She has produced SharePoint-related courseware for Mindsharp since 2002.

Penny has authored and coauthored a number of books. They include both editions of *Microsoft Office SharePoint Designer 2007 Step by Step*, *Microsoft SharePoint 2010 Administrator's Companion, Microsoft Office SharePoint Server 2007 Administrator's Companion*, *Microsoft SharePoint Products and Technologies Resources Kit, Microsoft SharePoint Foundation 2010 Step by Step*, and both editions of *Microsoft Windows SharePoint Services Step by Step.* Penny is frequently seen at TechEd and IT Forum, either as a technical learning guide or on the SharePoint Ask-the-Experts panels. She also speaks at the SharePoint Best Practices conferences, the European SharePoint Evolution Conference, Swedish SharePoint and Exchange Forums, SharePoint User Group U.K. meetings, and U.K. SharePoint Saturdays.

Penny lives in Hinckley, Leicestershire, England, with her husband, Peter, and dog, Poppy.

What do you think of this book?

We want to hear from you!

To participate in a brief online survey, please visit:

microsoft.com/learning/booksurvey

Tell us how well this book meets your needs—what works effectively, and what we can do better. Your feedback will help us continually improve our books and learning resources for you.

Thank you in advance for your input!

Microsoft® Press

Stay in touch!

To subscribe to the *Microsoft Press® Book Connection Newsletter*—for news on upcoming books, events, and special offers—please visit:

microsoft.com/learning/books/newsletter