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About the Author

**Kathy Hughes** is a Microsoft MVP for SharePoint Server with a Masters Degree in interaction design from the University of Technology in Sydney, Australia. Hughes trains and consults on SharePoint, focusing on design, usability, and customization. She contributed to multiple SharePoint Server 2007 books, and authored a comprehensive five-day SharePoint Server 2007 Designer course used by Mindsharp and its partners worldwide. She speaks regularly at Microsoft events including TechEd Australia and Office DevCon Australia.
Dedication

I dedicate this book to my husband, Andy Hughes.

—Kathy Hughes

Acknowledgments

When I was originally approached by Brook Farling of Sams Publishing in late 2009 to write this book, I jumped at the opportunity. After all, I’d co-authored two major SharePoint Server 2007 books and developed an extensive 5-day SharePoint Designer 2007 course for Mindsharp—what could possibly be different about writing an entire book? Well, 18 months—28 chapters—and in excess of 1700 pages later, I know! It was Bill English who told me how many hours he’d estimated to write an 800 – 900 page book. I gave up counting after the book surpassed the 1000 page mark. The book is testament to the product’s capabilities.

Throughout writing this book, I was fortunate to have the time and opportunity to deploy and work with the product in the field, which enabled me to incorporate real world scenarios. The team at Sams has been great. Neil Rowe, the book’s Editor, was extremely patient and I sometimes wondered just how far that patience would extend! Thank you, Neil, for not only giving me the time to write this book but also make it possible for the additional page count. I’d like to say thanks also to Mark Renfrow, the book’s Development Editor, Mandie Frank, the book’s Project Editor, Charlotte Kughen, the book’s Copy Editor, and Debbie Williams, the book’s Proofreader, and to others on the team I did not directly interact with.

Clayton Cobb, SharePoint MVP, did an outstanding job as the book’s Technical Editor. I distinctly remember when we worked together on validating authentication scenarios in Chapter 19, “Configuring External Data Sources (non-BCS).” At the time, the product was on the verge of final release and there were still a lot of unknowns around how authentication would work in SharePoint Designer data sources. It took a lot of testing and trial and error, and late night discussions with the Microsoft Connect support engineers. As a result, Clayton ended up producing an authentication matrix, which you can find on the book’s resource site. It’s this kind of testing and dedication that really helps to make a great book.
I also want to thank Joshua Haebets for writing Chapter 20, “External Content Types and External Lists (BCS),” and Chapter 27, “Using Workflows and Creating Custom Workflows.” I first met Joshua at Office DevCon Australia in late 2009, when SharePoint 2010 was just out in Beta and featured at the event. At the time, we were both into learning and rapidly adopting new features of the product. Joshua has been busy ever since presenting on SharePoint at various conferences in the U.S. and throughout the Asia Pacific region.

The community also played a part throughout writing this book. In particular, I want to thank Debbie Ireland, SharePoint MVP, based in New Zealand. Debbie's company EnvisionIT is responsible for AI SharePoint training and organizing annual SharePoint conferences throughout the Asia Pacific region. I’ve been fortunate to have worked with Debbie and her team in organizing several of the conferences and also in delivering SharePoint Designer training for her company. You’ll find some awesome examples throughout this book from conference websites and other work I’ve been involved with for her and her company. James Milne, SharePoint MVP based in Brisbane, kept my book schedule in check by regularly asking questions like “are you finished yet?” and “how’s the book going?” Thanks, James, for being such a good friend these past few years.

I’d also like to thank my fellow committee members from the Sydney Business and Technology User Group and keen social networking advocates, who never gave up on my book—even though at least one of them pre-ordered the book over a year ago!—Craig Bailey, Jodie Miners, Nicholas Rayner and Ewan Wallace. Thanks, guys.

Finally, I’d like to thank my family for their patience throughout the book project. My two children—Craig and Rachel—have grown yet another year and the book has been as much a part of their lives as it has mine—thanks guys. My Aunt Margaret was a huge support throughout writing my book—I only wish we’d connected sooner. My parents, who helped to inspire my interest in writing and poetry from an early age—the dog has aged! And, my husband Andy, who I dedicate this book to—as always, you are always there and I love you.
We Want to Hear from You!

As the reader of this book, you are our most important critic and commentator. We value your opinion and want to know what we’re doing right, what we could do better, what areas you’d like to see us publish in, and any other words of wisdom you’re willing to pass our way.

You can email or write me directly to let me know what you did or didn’t like about this book—as well as what we can do to make our books stronger.

Please note that I cannot help you with technical problems related to the topic of this book, and that due to the high volume of mail I receive, I might not be able to reply to every message.

When you write, please be sure to include this book’s title and author as well as your name and phone number or email address. I will carefully review your comments and share them with the author and editors who worked on the book.

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Visit our website and register this book at informit.com/register for convenient access to any updates, downloads, or errata that might be available for this book.
Introduction

Welcome to SharePoint Designer 2010 Unleashed! If you’re reading this introduction then it’s likely you have an interest in designing and customizing SharePoint 2010 sites. Perhaps you’ve just embarked on SharePoint, or you have been working with earlier versions of SharePoint and want to explore the exciting new features of SharePoint 2010. Either way, you won’t be disappointed. SharePoint Designer 2010 Unleashed is jam-packed with SharePoint design how-to’s and scenarios around how to work with various design components and content organization in SharePoint 2010 sites, using the ultimate customization tool of choice—SharePoint Designer 2010. I have been actively involved with SharePoint 2010 since the product’s early beta versions and have been customizing and deploying the product throughout the past couple of years. I am keen to share with you some of my real-world experiences working with SharePoint 2010!

This book factors in best practices around website design specific to SharePoint 2010 sites. Indeed, when working with website design, design is often referred to within the context of a website’s look and feel, or branding. In reality website design is about much more, including navigation, design of content and information within the website, and the various discovery techniques and tools used to present information. You can’t have one without the other; a great looking website without any content would quickly dwindle; a website that’s full of great content but is poorly branded and organized would quickly frustrate visitors. At some time or another, we’ve all seen those “page under construction” web pages, which don’t encourage us to go back for a second look! In other instances, organizations deploy a web product imagining that the technology itself will solve user needs, which is not the case. It’s one thing to know how to use the tools: it’s another to know why, and SharePoint 2010 is no exception. Although the product includes powerful customization options, you still need to craft a SharePoint 2010 deployment for it to be successful.

In addition to working with SharePoint Designer 2010 to build and extend SharePoint design and customization, SharePoint 2010 includes a wealth of Web interface design tools (also known as in-browser tools) to present data, including data from external data sources and throughout SharePoint 2010 sites—for example, a Silverlight Web Part to display a Silverlight application package (.XAP) within a SharePoint page and Business Data Web Parts for connecting to and presenting Line of Business (LOB) data from backend systems. Content Rollup Web Parts can be used to selectively display content from within SharePoint sites, while social networking and metadata-driven features, such as tag clouds, and provide for enriched navigational options. In addition, you can

Web designers will realize the flexible design options in SharePoint Designer 2010, including working with and creating SharePoint master pages and cascading styles sheets (CSS) to achieve a consistent look and feel across all pages within a site. Designers will embrace the cross browser support and support for the World Wide Web Consortium (W3C) standards compliance and Web Content Accessibility Guidelines (WCAG) features of the product. If your focus is around making your SharePoint 2010 site look and feel like Web 2, then you'll love the built-in design and editing capabilities of SharePoint Designer 2010. The book includes some great examples and scenarios around how to work with those tools and implement solutions that you can use in your own environment.

SharePoint Designer 2010 includes a wealth of tools for working with and creating custom workflows and business intelligence solutions. Indeed, SharePoint Designer 2010 is viewed as the go-to tool for creating robust and reusable workflows for SharePoint 2010 sites and site collections. The fact that workflows created in SharePoint Designer 2010 can be integrated with Visio 2010 and also exported out to Visual Studio 2010 for additional development makes the product an attractive tool for business analysts, documenters, and developers.

Workflows in SharePoint Designer 2010 have been greatly enhanced from those in SharePoint Designer 2007. If you worked with and created custom workflows in SharePoint Designer 2007 you might be aware of the limitations that existed around those workflows, such as a workflow being limited to one specific list within a SharePoint 2007 site. SharePoint Designer 2010 overcomes that limitation by including the option to create reusable workflows that can be associated with any list or content type within a SharePoint site and site collection. You’ll learn how to create powerful workflows using SharePoint Designer 2010.

Using SharePoint Designer 2010, you can create powerful business intelligence solutions, including configuring create, read, update and delete (CRUD) operations with external data sources—such as SQL Server—code free! SharePoint Designer 2010 Unleashed will show you how to effectively use those tools to integrate back-end data with your SharePoint 2010 sites and create rich and interactive dashboards.

There are far too many features covered in the book to discuss here. I’ve given you a taste of some of what you can expect from this book. You’re about to embark on an adventure with the most exciting and powerful new product—an adventure that wouldn’t be complete without SharePoint Designer 2010 Unleashed.
Who This Book Is For

This book is intended primarily for Web designers and information workers working with and customizing SharePoint 2010 sites using SharePoint Designer 2010. However, it is suitable for many other disciplines, including:

- **Web designers**: Learn how to work with SharePoint 2010 site templates and build custom SharePoint 2010 master pages, CSS, and themes. You learn how to style Web parts, along with best practices for deploying customizations created in SharePoint Designer 2010 to SharePoint 2010 sites and site collections. Designers also learn how to modify and enhance navigational menus, customize the new ribbon interface, and build custom Web forms for SharePoint 2010 lists and libraries.

- **Information workers and business analysts**: Learn how to work with SharePoint Designer 2010 to create new SharePoint 2010 sites and enhance content within existing SharePoint sites. You also learn how to leverage new SharePoint integration in Visio 2010 to design workflows and then see how those Visio diagrams can be imported into SharePoint Designer 2010 for subsequent construction of a SharePoint workflow.

- **Developers**: Learn how to customize and work with Web interface features and SharePoint Designer 2010, including working with XSLT List Form Web Parts and Data Views, and how to use the tools to build standards-compliant SharePoint 2010 pages. You also begin to understand the extent of code-free customizations, such as reusable workflows and options for configuring external data sources by working with the new Business Connectivity Services (BCS) features included in SharePoint Designer 2010.

- **IT managers, decision makers, and system administrators**: Understand where and how SharePoint Designer 2010 fits into a SharePoint 2010 deployment along with best practices for controlling user access to editing features within SharePoint Designer 2010 and best practices around deploying customizations.

- **Project managers**: Understand what can be achieved in SharePoint Designer 2010 and the various roles it supports throughout a SharePoint 2010 implementation.

To assist you in determining key areas of interest throughout this book based on your discipline, we’ve mapped chapters of interest specific to profile type in the following sections.

**SharePoint Designer for Business Analysts and Project Managers**

If you’re reading this book and your role is that of a business analyst or project manager then the following chapters might be of particular interest to you.

Chapters 1 and 2 provide a great overview of SharePoint 2010 as well as the product’s underlying architecture. If you’re planning on working in a team comprised of other
SharePoint disciplines, such as architects and developers, then you’ll benefit by understanding the base technology and how all the pieces fit together. Chapters 3 to 6 provide a detailed overview of what can be achieved when customizing SharePoint 2010 sites via the browser. They also provide explanation of when you might consider using SharePoint Designer 2010 to extend on browser customization.

**SharePoint Designer for Developers and Designers**

If you’re reading this book and your role is that of a Web designer then the following chapters might be of particular interest to you.

Definitely Parts I through (and including) IV because you should gain understanding of how you can leverage SharePoint Designer 2010 to customize SharePoint 2010 sites. Then again, if you are new to using SharePoint, you can benefit by reading through Chapters 1 and 2 to understand the product and its underlying architecture.

**SharePoint Designer for IT Pros and Administrators**

If you’re reading this book and your role is related to an IT professional or more to that of an IT administrator then the following chapters might be of particular interest to you.

It’s likely that IT professionals and IT administrators will be interested in how they can manage SharePoint 2010 along with SharePoint Designer 2010 in their existing environments. For instance, Chapter 7 walks through locking down access to SharePoint Designer 2010 at the Web Application and site collection levels and shows you how you can control exactly what can be customized using SharePoint Designer 2010. You can also benefit by understanding the product and new features like the sandboxed solution, which is discussed throughout Chapters 1 and 2. Chapter 4 is a must because it covers site collection creation and configuring SharePoint 2010 anonymous sites.

**What This Book Covers**

I should point out that *SharePoint Designer 2010 Unleashed* is focused on designing and customizing SharePoint Server 2010 sites as opposed to SharePoint Foundation 2010 sites (the updated version of Windows SharePoint Services (WSS) 3.0). SharePoint Foundation 2010, as a standalone installation, is lacking a number of features included with SharePoint Server 2010, such as enterprise search, business intelligence, approval and publishing workflow, taxonomy store, content management features, and other features associated with BCS, formerly Business Data Catalog (BDC) in SharePoint Server 2007.

Although you can use SharePoint Designer 2010 to design and customize SharePoint Foundation 2010 sites as well as SharePoint Server 2010 sites, and there is crossover between the two products in terms of core functionality including master pages and CSS, this book delves into those features specific to SharePoint Server 2010. I highlight the main product differences throughout the book where necessary and advise where customizations are specific to both or one of SharePoint Server 2010 and SharePoint Foundation 2010.
NOTE

Where functionality is synonymous to both SharePoint Server 2010 and SharePoint Foundation 2010, I use the term SharePoint 2010. Where functionality is synonymous to both SharePoint Server 2007 and Windows SharePoint Services 3.0, I use the term SharePoint 2007.

SharePoint Designer 2010 Unleashed concentrates mostly on no-code solutions for SharePoint Server 2010 using SharePoint Designer 2010 and related applications. By no-code, I mean no in-depth SharePoint development using the SharePoint server application programming interface (API) or object model. However, to help demonstrate features such as modifying the new ribbon interface and enhancing look and feel of pages within SharePoint 2010 sites, the book does include use of some client-side coding including Cascading Style sheet (CSS) scripting, eXtensible Stylesheet Language (XSLT), eXtendible Markup Language (XML), XML Path Language (XPath), eXtensible Hypertext Markup Language (XHTML), Asynchronous JavaScript and XML (AJAX), and jQuery (JavaScript).

The book is divided into 4 parts, as follows:

Part I: Welcome to SharePoint Server 2010!

This section introduces SharePoint 2010. If you are new to SharePoint or SharePoint 2010, then read this section first to understand what SharePoint is, what is included with SharePoint 2010, and what’s changed since SharePoint 2007. This section serves as the starting point before you delve into the actual design and customization of the product using SharePoint Designer 2010. Understanding the key components of SharePoint 2010, along with an understanding of the key architectural concepts, better positions you for determining the benefits of designing and customizing SharePoint sites. This section also covers Web interface design options to help you understand what can be achieved using in-browser tools before you launch into using SharePoint Designer 2010 to extend on design and customization of SharePoint sites.

Chapter 1, “SharePoint 2010 Overview,” provides an overview of SharePoint 2010 and explains key changes since SharePoint 2007. The product’s key functional areas are explained, including the new user interface and document management enhancements. This chapter is a good starting point if you want to gain a rapid understanding of SharePoint 2010 features.

In Chapter 2, “SharePoint 2010 Architectural Overview,” you find details on SharePoint 2010 architecture, including SharePoint farm organization and core administrative features. This chapter is highly recommended for those about to embark on designing and customizing SharePoint 2010. It explains the overall hierarchy of a SharePoint 2010 deployment and addresses key areas for design and customization within a SharePoint farm. In other words, you’ll understand what to address when considering designing
SharePoint along with administrative considerations when implementing design. This chapter also explains infrastructure architecture, including content types and Features, both of which are key to a successful SharePoint deployment.

Chapter 3, “Introduction to the SharePoint 2010 Fluid Interface,” introduces the SharePoint 2010 fluid interface, including an overview of the ribbon and how the ribbon works.

Chapter 4, “Design Administrative Tasks: Site Settings, Permissions, and Creating Sites,” covers administrative tasks relating to customizing SharePoint 2010 sites, including creating a new site collection, understanding and managing SharePoint 2010 permissions and permission inheritance, and a walk-through of site settings. This chapter also shows you how to configure SharePoint 2010 sites for anonymous access and includes discussion around locking down forms pages in anonymous sites.

Chapter 5, “In-Browser Customization: Navigation, Content Pages, and Content,” is the first of two chapters that covers the wealth of Web interface customization. This chapter covers how navigation in SharePoint 2010 works, introduces you to the different types of content pages, and shows you how to work with pages and content in SharePoint 2010 sites and site collections.

Chapter 6, “In-Browser Customization: Branding with Web Parts, Themes, and Master Pages,” is the second of two chapters covering web interface customization and covers designing with Web parts, master pages, and themes in SharePoint 2010 sites. Specifically, this chapter provides a good overview of the Media Web Part and Silverlight Web Part. It also shows you how you can use the Content Editor Web Part and HTML Forms Web Part to customize SharePoint pages.

**Part II: Enhancing Sites with SharePoint Designer 2010**

This section introduces SharePoint Designer 2010 and how to work with the product, including understanding the SharePoint Designer 2010 interface, accessing key components and toolsets in SharePoint Designer, and how to use SharePoint Designer to create and deploy lists and libraries. It also covers working with SharePoint 2010 sites and site templates, content types, and columns.

Chapter 7, “Web Interface Design with SharePoint Designer 2010,” provides an overview of SharePoint Designer 2010 and familiarizes you with the various tools and integration features of the product. If you currently use, or have used, SharePoint Designer 2007 then you’ll find this chapter invaluable given the extensive changes between that of Designer 2007 and Designer 2010. If you’re new to SharePoint Designer then you’ll definitely want to read this chapter before moving forward with subsequent chapters. I show you how to work with the SharePoint Designer 2010 ribbon and introduce you to the SharePoint Designer backstage.

Chapter 8, “Creating Sites with Site Templates,” dives into creating new SharePoint sites using SharePoint Designer 2010. You’ll begin to understand the extent of the out-of-the-box site templates, including publishing and non-publishing site templates and the new
enterprise Wiki site template. This chapter also covers creating of new site templates and template deployment options. You’ll also learn how to work with existing and apply new content types and columns to sites.

Chapter 9, “Working with Content Types and Columns,” shows you how you can create new content types and columns in SharePoint Designer 2010.

Chapter 10, “Creating and Configuring Lists and Libraries,” shows you how to work with existing and how to create and customize new SharePoint lists and libraries. You’ll learn how to leverage SharePoint Designer tools to add columns, validation, and content types to lists and libraries.

**Part III: Styling and Designing SharePoint 2010 Sites**

From this point on, the book focuses on working with SharePoint Designer 2010 to expand on those features explained in Part II, including creating SharePoint 2010 master pages, creating new content pages, and working with and configuring Web parts in SharePoint Designer 2010.

Chapter 11, “Understanding SharePoint Designer Editing Features,” starts by introducing you to the wealth of editing features available in SharePoint Designer 2010 when working with content pages, including task panes and page editor options.

Chapter 12, “Working with Content Pages in SharePoint Designer,” delves into working with content pages in SharePoint Designer and discusses key differences between working with content pages in the Web interface and SharePoint Designer.

Chapter 13, “Building New Content Pages and Configuring Web Parts and Web Part Zones,” shows you how to effectively build new pages in SharePoint Designer 2010, including creating new Web part page layouts and working with and configuring Web parts. You’ll also learn how to add and work with images throughout SharePoint pages.

Chapter 14, “Extending Content Pages with Media and Dialogs,” extends on Chapter 13 by showing you some tricks and tips around how you can extend content page design by incorporating media and leveraging the SharePoint 2010 dialog framework to create some nifty effects when working with forms.


Chapter 16, “Working with and Creating New SharePoint Cascading Style Sheets (CSS),” Chapter 17, “Creating New SharePoint Master Pages,” and Chapter 18, “SharePoint Themes and Themable CSS: The Icing on the Cake,” cover SharePoint 2010 cascading style sheets (CSS), master pages, and themes. You’ll learn how to create new CSS, customize and create new master pages, and create and customize themes and deploy them throughout SharePoint 2010 site collections. I also show you how to work with and manage the
Part IV: Data Manipulation and Business Processes

This section covers the business intelligence features of SharePoint 2010, including BCS and configuration of other external data sources, including Representational State Transfer (REST), presentation of data sources via XSLT List View Web Parts and Data Form Web Parts, along with customization of list forms, including ASPX Web forms and InfoPath 2010. You’ll also learn how to create and configure new ribbon buttons and commands using both SharePoint Designer 2010 and Visual Studio 2010.

Chapter 19, “Configuring External Data Sources (non-BCS),” shows you how to configure data sources, including RSS, REST, linked data sources and configure data connections to SQL server. You also learn how to work with the various authentication methods when configuring external connections.

Chapter 20, “External Content Types and External Lists (BCS),” examines the BCS feature, which replaces the BDC introduced in SharePoint 2007. In this chapter, you’ll learn how to configure and work with BCS, external content types and lists, and configure profile pages. You’ll also learn how to integrate BCS with Office.

Chapter 21, “Manipulating Data with ASP.NET Data Controls,” shows you how to use the ASP.NET controls available in the SharePoint Designer 2010 toolbox, to perform functions such as adding an SQL connection directly into a SharePoint 2010 page.

Chapter 22, “Overview of XSLT List View and Data View Web Parts in SharePoint 2010,” provides an overview of the XSLT List View Web Part and the Data View Web Part in SharePoint 2010 sites. This chapter provides a wealth of information on the key differences between the two Web parts and gives consideration as to when you should use one Web part over the other.

Chapter 23, “Working with XSLT List View Web Parts (XLVs),” and Chapter 24, “Working with the Data View and Data Form Web Parts,” dive into how to use the XSLT List View Web Part and Data Form Web Part to enhance functionality throughout SharePoint 2010 sites. You’ll learn how you can leverage content types to integrate custom XSLT styles into the SharePoint Designer 2010 ribbon, which you can then reuse to style both XSLT List View and Data View Web Parts. You’ll also learn how to effectively present data brought in from external data connections and how to add ratings to SharePoint 2010 blog posts. These chapters also include real-world examples, including use of jQuery to enhance data presentation.

Chapter 25, “Configuring and Customizing List Forms,” shows you how to customize the out-of-the-box list forms, specifically the ASPX Web forms. You’ll learn how to work with
forms and content types, assign forms to different content types and selectively hide and show fields. We also show you how to use jQuery to achieve cascading drop-downs in SharePoint list forms.

Chapter 26, “Customizing List Forms with InfoPath 2010 Forms,” shows you how to replace the out-of-the-box list forms with InfoPath 2010 forms, including working with and retrieving data lookups. The chapter introduces you to the new features available when working with InfoPath forms and replacing SharePoint list forms.

Chapter 27, “Using Workflows and Creating Custom Workflows,” covers SharePoint 2010 workflows and shows you how to customize the out-of-the-box workflows and create new workflows in SharePoint Designer 2010. You’ll learn how to design workflows in Visio 2010, build workflows using conditions and actions in SharePoint Designer 2010; understand the differences between the different type of workflows, including lists and reusable workflows and how you can deploy workflows beyond a SharePoint 2010 site collection.

Chapter 28, “Creating Custom List Actions: Adding Buttons to the Ribbon and List Item Menus,” shows you how to create custom ribbon buttons (commands) using SharePoint Designer 2010. You’ll learn how to create new buttons in the ribbon as well as new list item menu (LIM) buttons. You’ll also learn how use Visual Studio 2010 to create ribbon customizations beyond what SharePoint Designer 2010 can do. Plus, you’ll learn how to set permissions (mask) on ribbon buttons.

What You Need to Work with the Book’s Exercises

Due to licensing restrictions, we are not able to provide you with Microsoft software discussed and demonstrated throughout this book. However, the good news is that SharePoint Designer 2010 is provided by Microsoft as a free download.

We recommend that you familiarize yourself with SharePoint 2010 within an isolated, or development, environment. In order to work with the exercises throughout this book, you need the following software.

- SharePoint Server 2010 Enterprise Edition*
- SharePoint Designer 2010**
- Visual Studio 2010
- InfoPath Designer 2010
- Visio 2010 (Premium)***
- PowerPoint 2007 or PowerPoint 2010
- Notepad
Web browser and browser debugging tools, including Internet Explorer Development Toolbar and Firebug for Mozilla Firefox

Other downloadable tools and open source code, including the AdventureWorks database and jQuery library. I include relevant links throughout the various exercises and scenarios in this book.

*Most exercises throughout this book can be adapted to a SharePoint Foundation 2010 installation. Additionally, Microsoft has made available a downloadable “2010 Information Worker Demonstration and Evaluation Virtual Machine (RTM)”, which includes:


Details, along with download link and system requirements, can be found at the following address:


**SharePoint Designer 2010 is a free download, available for download from the following address:


***In order to integrate workflows with SharePoint Designer 2010, you need Visio 2010 Premium version. The premium version of the product includes the SharePoint 2010 workflow stencils and import and export commands required to integrate workflows with SharePoint Designer 2010.

**Product Updates**

In addition to product downloads, you should continue to monitor product updates, including cumulative updates and service packs, on the Microsoft SharePoint Team Blog, http://sharepoint.microsoft.com/blog/pages/default.aspx.

**Book Resources**

Code and some downloads referred to throughout this book can be found at the book’s website at http://informit.com/title/9780672331053.
Authoring Environment

The exercises and demonstrations throughout the book were created and tested using the following servers, clients and applications, running on 64-bit physical server architecture:

- Server base - Windows Server 2008 R2 - 64bit
- SQL Server 2008 and SQL Server 2008 R2
- Active Directory (domain functional level Windows Server 2008 R2)
- Exchange Server 2010
- Clients - Windows XP, Windows 7 - 64bit
- SharePoint Designer 2010 – 32bit and 64bit
- SharePoint Designer 2007 - 32bit
- Visual Studio 2008
- Visual Studio 2010
- SharePoint Server 2010 Enterprise - 64bit
- SharePoint Server 2007 Enterprise - 32bit
- SharePoint Foundation 2010 – 64bit
- Visio 2010 (Premium) - 32bit
- Office 2007 - 32bit
- Office 2010 - 64bit and 32bit (Including Visio, InfoPath and SharePoint Workspace 2010)

Browsers (Windows):

- Internet Explorer 7 32bit
- Internet Explorer 8 32bit
- Internet Explorer 9 32bit
- Firefox 3.5+
- Microsoft Expression 3, including Expression Blend 3, and Expression Blend 4

The internal environment uses both NTLM and Kerberos authentication protocols. The Secure Store service, newly introduced to SharePoint 2010 that supersedes Single Sign-On (SSO) previously used in SharePoint 2007, is used for configuring data connections to external data sources.

An externally hosted SharePoint Server 2010 and SharePoint Foundation 2010 site is used to test branding differences between authenticated and anonymous users.
# How to Use This Book

To assist you in understanding some of the product terminology throughout this book we’ve listed the naming conventions in the following table.

<table>
<thead>
<tr>
<th>Official Product Name</th>
<th>Name as used in this book</th>
<th>Abbreviations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft SharePoint Server 2010</td>
<td>SharePoint Server 2010 / SharePoint 2010</td>
<td>SPS 2010 or SP 2010</td>
</tr>
<tr>
<td>Microsoft SharePoint Foundation 2010</td>
<td>SharePoint Foundation 2010 / SharePoint 2010</td>
<td>SPF 2010 or SP 2010</td>
</tr>
<tr>
<td>Microsoft Office SharePoint Server 2007</td>
<td>SharePoint 2007</td>
<td>MOSS</td>
</tr>
<tr>
<td>Microsoft Windows SharePoint Services 3.0</td>
<td>Windows SharePoint Services 3.0</td>
<td>WSS</td>
</tr>
</tbody>
</table>

Note: To simplify things, I use the term SharePoint 2010 throughout this book where I refer to functionality synonymous to both SharePoint Server 2010 and SharePoint Foundation 2010.

Note: To simplify things, I use the term SharePoint 2007 throughout this book where I refer to functionality synonymous to both SharePoint Server 2007 and Windows SharePoint Services 3.0.

<table>
<thead>
<tr>
<th>Microsoft SharePoint Designer 2010</th>
<th>SharePoint Designer 2010</th>
<th>SPD 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft SharePoint Designer 2007</td>
<td>SharePoint Designer 2007</td>
<td>SPD 2007</td>
</tr>
<tr>
<td>Microsoft Visual Studio 2010</td>
<td>Visual Studio 2010</td>
<td>VS 2010</td>
</tr>
<tr>
<td>Microsoft Office 2010</td>
<td>Office 2010</td>
<td></td>
</tr>
<tr>
<td>Microsoft Visio 2010</td>
<td>Visio 2010</td>
<td></td>
</tr>
<tr>
<td>Microsoft SharePoint Workspace 2010</td>
<td>SharePoint Workspace 2010</td>
<td>SPW 2010</td>
</tr>
<tr>
<td>Microsoft Office 2007</td>
<td>Office 2007</td>
<td></td>
</tr>
</tbody>
</table>
Throughout this book are reader aids, including sidebars for best practice and sections pertaining to more important features that are noted accordingly. The following table lists the main sidebars.

<table>
<thead>
<tr>
<th>Sidebar Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Site</td>
<td>Indicates that the content is available on the book’s website</td>
</tr>
<tr>
<td>Best Practice</td>
<td>Alerts the reader to best practices when working with or implementing customizations.</td>
</tr>
<tr>
<td>Note</td>
<td>Additional information, for instance what or what not to do when implementing a particular feature throughout a SharePoint deployment of important information.</td>
</tr>
</tbody>
</table>

**Contacting the Author**

You may contact me by visiting my website at www.kathyhughes.com and completing the contact form. I will post updates to this book to both the book’s website and my own website. You can also find additional reading material on my website, including whitepapers and articles.
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CHAPTER 7
Web Interface Design with SharePoint Designer 2010

In Part I, “Welcome to SharePoint Server 2010!” of the book, you learn how to customize SharePoint 2010 sites using in-browser tools. In Part III, “Styling and Designing SharePoint Sites,” you learn how SharePoint Designer 2010 can extend the Web interface customizations and go beyond that which you can achieve using the browser to design and customize your SharePoint sites.

This chapter provides an overview of SharePoint Designer 2010. You will learn about the new user interface and how to use the product to access and work with existing SharePoint sites and create new SharePoint sites. If you have worked with SharePoint Designer 2007, this chapter explains the differences between SharePoint Designer 2007 and SharePoint Designer 2010, including redundant features.

Introduction to SharePoint Designer

SharePoint Designer 2010 is the ultimate tool for customizing, prototyping, and designing SharePoint 2010 sites. Built on ASP.NET 3.5, SharePoint Designer 2010 provides IT pros, information workers, and Web designers the ability to create code-free SharePoint 2010 solutions, including powerful integration capabilities with data sources such as SQL databases and Web services, business intelligence solutions via the Business Connectivity Services (BCS) model, and custom workflows that can be adapted to existing business processes. A what-you-see-is-what-you-get (WYSIWYG) interface enables Web designers to gain a more realistic view of design and customization ahead of deploying custom attributes to SharePoint sites, such as master pages and CSS files.
The scope of SharePoint Designer 2010 features includes:

- Code-free customizations
- Prototype design and customization
- Design and create SharePoint master pages and CSS files
- Modify and customize themed CSS files
- Style SharePoint list views, including conditional formatting and use of XSLT
- Create multiple forms for lists, such as edit and display forms
- Create new SharePoint sites
- Create new lists, document libraries, and site columns
- Add new SharePoint permission groups and modify group membership
- Create new publishing page layouts and new Web part pages
- Create declarative list and reusable workflows, including creation of custom workflow forms and approval tasks
- Import and export workflows to Visio 2010
- Connect to SQL server databases and other data sources and establish powerful querying and filtering between linked data sources
- Create interactive data connections to external data including create, read, update and delete (CRUD) operations
- Save sites as templates (WSP files) and export those WSP files for further development in Visual Studio 2010. Additionally, you can also export workflows to WSP for further development in Visual Studio 2010.

**NOTE**


**Who Is SharePoint Designer For?**

I could potentially write a small manuscript on who could use SharePoint Designer 2010, along with all the types of scenarios and reasons for using it. But, typically, SharePoint Designer is seen as the ideal tool for web designers and information workers who are responsible for designing and customizing SharePoint sites. Site owners, or administrators, can take advantage of the new rich editing features in SharePoint Designer 2010 to admin-
ister sites and create new content, such as lists and document libraries. Developers will find SharePoint Designer an ideal tool for prototyping solutions, including creating and working with “codeless” solutions. They will also leverage the share capability between SharePoint Designer 2010 and Visual Studio 2010, including options to import custom workflows and prototyped sites into Visual Studio 2010 from SharePoint Designer 2010. Business analysts will love the extensible workflow opportunities in SharePoint Designer 2010 and will readily embrace the built-in workflow wizards and integration with Visio 2010 to create robust and reusable workflows.

**Limitations of SharePoint Designer**

Obviously, although SharePoint Designer 2010 is the ideal tool for customizing, designing, integrating additional functionality, and prototyping SharePoint sites, it does have several limitations. The key limitations are mentioned here.

SharePoint Designer is not Visual Studio, so it cannot be used in the following scenarios:

- As a compiler, that is, code compilation; it does not include a code behind (page) option and cannot attach .NET or SharePoint classes.
- As a tool for creating complex Web parts, Features, or Solutions, such as packages for deploying common customizations to SharePoint servers or across multiple SharePoint site collections.
- For the creation of workflow activities.
- As a debugger.
- To create Wiki pages.

**Changes from SharePoint Designer 2007 to SharePoint Designer 2010**

A major change between SharePoint Designer 2007 and SharePoint Designer 2010 is that SharePoint Designer 2010 includes much tighter integration with SharePoint 2010 sites and now includes the ability to create common site objects such as lists and document libraries, content types, and columns. Another major change is that SharePoint Designer 2010 can only be used with SharePoint 2010 sites, but SharePoint Designer 2007 could be used to customize and create both SharePoint Server 2007 and non-SharePoint websites.

The SharePoint Designer 2010 user interface has undergone significant changes. If you review, for a moment, the typical home page of SharePoint Designer 2007, as shown in Figure 7.1, you see some familiar sections including menus, task panes, and a working space in the middle of the page. SharePoint Designer 2007 leveraged task panes, those sections on either side of the main working space, significantly for editing purposes which meant consuming valuable screen real estate.
By comparison, the SharePoint Designer 2010 screen, shown in Figure 7.2, provides a new and fresher look to that of its counterpart shown in Figure 7.1. Although you can still use task panes for editing purposes, there is no longer that same level of dependency on using them. This is largely due to the fact that SharePoint Designer 2010, just like SharePoint 2010, includes the contextual ribbon interface, which can be leveraged for accessing common editing actions.
To gain an overall picture of changes between SharePoint Designer 2007 and SharePoint Designer 2010, let’s quickly examine the new features and the features removed in SharePoint Designer 2010.

**New or Improved Features**
The following key features are new to, or improved in, SharePoint Designer 2010:

- Contextual ribbon interface
- A new backstage screen for managing common application configuration settings, uploading custom add-ons, and customizing the SharePoint Designer 2010 ribbon
- Manage existing site list and document library settings
- Create new lists and document libraries
- Create and work with site columns
- Style list and document library views using XSLT
- Reusable workflows are no longer limited to list-specific workflows
- Site Workflows are no longer required to be triggered on a list item
- Ability to export reusable workflows to Visual Studio 2010
- Import and export capabilities for workflow design with Visio 2010
- Replace list and document library forms with InfoPath forms (SharePoint Server 2010 Enterprise only)
- Add multiple forms to lists and document libraries and content types
- User permission capabilities including the ability to add new users to SharePoint groups, add new SharePoint groups, and assign existing site permission levels to SharePoint groups
- New slick editing and CSS tools, including the Skewer Click tool for quickly accessing a page’s tag properties
- Create external content types and external lists with CRUD operations (previously known in SharePoint 2007 as the Business Data Catalog)

**Features Removed**
The following key features, previously included in SharePoint Designer 2007, have been removed in SharePoint Designer 2010:

- Solid dependency on use of task panes
- Import and export of Web packages
- Backup and restore sites and site collections
The ability to attach a list or document library from within another site in a site collection when working with data sources

- Site usage reports
- Publish websites and file transfer protocol (FTP) functionality
- Layout table tools
- The ability to open non-SharePoint sites and Web pages outside of a SharePoint 2010 site


**Compatibility and Product Versions**

The following are important factors when considering using SharePoint Designer to customize and design your SharePoint sites:

- The current version of SharePoint you are running.
- Whether, as part of your SharePoint Server 2007 or Windows SharePoint Services 3.0 to SharePoint 2010 upgrade, you might be required to also upgrade earlier customizations done using SharePoint Designer 2007 to SharePoint Designer 2010. This might include Data View Web parts, master pages, and CSS files.
- You have other, non-SharePoint, websites, such as ASP.NET 2 websites, that you also want to customize and design using SharePoint Designer.

In the first instance, you need to be aware that SharePoint Designer 2010 cannot be used with SharePoint Server 2007 or Windows SharePoint Services 3.0 sites. By the same token, SharePoint Designer 2007 cannot be used with SharePoint 2010 sites.

In the second instance, you should be aware that both SharePoint Designer 2007 and SharePoint Designer 2010 can co-exist on the same computer. However, this works best when you install SharePoint Designer 2010 first and then install SharePoint Designer 2007. Attempting to install SharePoint Designer 2010 on a computer where SharePoint Designer 2007 is currently installed instead attempts to upgrade SharePoint Designer 2007 to SharePoint Designer 2010.

**NOTE**

If you install Office 2010 64-bit, including SPD 2010 64-bit, you can then install SPD 2007 32-bit on top of it.

In the third instance, SharePoint Designer 2010 is specifically for use with SharePoint 2010 sites and cannot be used to work with non-SharePoint sites, such as static HTML sites or other non-SharePoint web pages. Attempting to open a non-SharePoint page in SharePoint Designer 2010 results in a dialog as shown in Figure 7.3.
For customizing non-SharePoint sites, Microsoft Expression Web is recommended. However, be aware that Expression Web also cannot be used with SharePoint sites. If you attempt to open a SharePoint site or page using Microsoft Expression Web then a dialog displays as shown in Figure 7.4.

NOTE

Expression Web can co-exist on the same computer as both SharePoint Designer 2007 and SharePoint Designer 2010. However, if you intend to primarily work with SharePoint Designer and SharePoint content, be careful not to make Expression Web the default editor for websites or else you might find that attempting to edit SharePoint pages incorrectly associates with Expression Web.

SharePoint Designer 2010 System Requirements

Like SharePoint Designer 2007, SharePoint Designer 2010 (both the 32-bit and 64-bit versions) is a free download from Microsoft. However, there are some core system requirements you should be aware of before installing SharePoint Designer 2010. These include

- The ASP.NET 3.5 framework must be installed
- A 500MHz processor or greater computer
- Approximately 256MB or greater memory allocation
- Approximately 2.5GB of disk space
Browser support for previewing pages, including Internet Explorer 7 or greater and Firefox 3.5 or greater

SharePoint Designer Security and Permission Settings

One of the most frequently asked questions around deploying and using SharePoint Designer within an organization is around locking down access and/or controlling what users can do. For instance, IT administrators are often reluctant to give users access to SharePoint Designer because they are concerned with administrative overhead, such as accidental deletion of SharePoint sites or content or changes that cannot be easily undone, especially where access is given on a live and in-production SharePoint site. Although I strongly recommend that users be thoroughly trained in SharePoint Designer 2010 ahead of using it to customize and design SharePoint sites, SharePoint 2010 includes options around locking down access to SharePoint Designer to help avoid those kinds of issues explained earlier. In this section, you learn about the security settings that you can use to limit access to and editing of SharePoint sites in SharePoint Designer 2010.

How We Did It in SharePoint Designer 2007

If you’ve previously used SharePoint Designer 2007, then you might already be familiar with the concept of Contributor Settings. Although SharePoint Designer 2007 leveraged existing user permissions in SharePoint Server 2007 sites, limiting user access to editing features in SharePoint Designer 2007 meant additional configuration. Contributor Settings are redundant in SharePoint Designer 2010 and control of user access in respect to working with SharePoint Designer is now centralized via user permissions set on the respective SharePoint 2010 site.

Additionally, if you wanted to completely disable access to SharePoint Designer 2007 and stop users from opening SharePoint sites in SharePoint Designer, you needed to modify the respective site definition’s onet.xml file, located in the Web front-end server, and add the parameter `DisableWebDesignFeatures="wdfopensite"` to the site definition's Project tag. Although this same parameter may be used in SharePoint 2010 site definitions, it is not necessary to use it in order to disable use of SharePoint Designer 2010 on a site collection. Access to SharePoint Designer 2010 can be blocked via settings in the Web interface.

**NOTE**

By default, sites provisioned based on the out-of-the-box SharePoint Server 2010 Access Web Database site templates, such as Assets Web Database, Charitable Contributions Web Database, Projects Web Database, and Issues Web Database, cannot be opened in SharePoint Designer 2010. This is because the associated AccSrv site definition’s onet.xml file, located on the Web front-end server, includes the parameter `"DisableWebDesignFeatures="wdfopensite"` in the Project tag as shown in Figure 7.5.

Drilldown into Controlling Access to SharePoint Designer 2010

Locking down and controlling access to SharePoint Designer 2010 can be done via the Web interface, without the need for additional configuration in SharePoint Designer or
accessing the Web front-end server to modify a SharePoint site definition’s onet.xml file. In addition, access to SharePoint Designer 2010 can be locked down at either the Web application or site collection levels.

As Table 7.1 shows, controlling access to SharePoint Designer 2010 offers a flexible model and one that should be considered as part of your upfront SharePoint deployment considerations. For instance, controlling SharePoint Designer 2010 settings at Web application level means that any site collections created under that Web application inherits those settings. At the other end of the spectrum, the permission model is flexible enough to allow site owners to limit what users can do with SharePoint Designer 2010 on a site-by-site basis by leveraging SharePoint 2010 permissions.

<table>
<thead>
<tr>
<th>Permission Scope</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Application</td>
<td>Stop or limit use of SharePoint Designer 2010 in all Site Collections created under a Web application</td>
</tr>
<tr>
<td>Site Collection</td>
<td>Stop or limit use of SharePoint Designer 2010 in sites created within a Site Collection</td>
</tr>
<tr>
<td>Site (Web) Permissions</td>
<td>Limit access to SharePoint Designer 2010 on a site-by-site basis by leveraging SharePoint Groups and user permissions</td>
</tr>
</tbody>
</table>

Obviously, establishing the degree to which you need to lock down, or disable, SharePoint Designer is a critical part of your upfront design decisions and planning. For instance, if you have MySites deployed throughout your organization, you might want to allow users to edit their MySites in SharePoint Designer but not allow them to edit other sites. In this case, your upfront architecture, including Web application design, is important to ensure that you have that flexibility.

Let’s review each of the SharePoint Designer 2010 permission scopes, commencing at the Web application level.
**Web Application SharePoint Designer Settings**

SharePoint Designer settings at the Web application level provide the greatest amount of control and can limit everyone, including site collection administrators, from opening sites in SharePoint Designer 2010. There are four lockdown settings available as shown in Figure 7.6 and Table 7.2. By default, when a Web application is created, all four options are enabled.

![SharePoint Designer Settings](image)

**FIGURE 7.6** SharePoint settings at the Web application level.

**NOTE**

The same four options you see in Figure 7.6 and listed in Table 7.2 are also available via the root site of each site collection. However, which options are selected at the Web application level determines availability of SharePoint Designer options at the site collection level. For instance, if Enable SharePoint Designer is unchecked at the Web application level, then Enable SharePoint Designer at the site collection level is removed.

**NOTE**

If Enable SharePoint Designer is initially unchecked, the remaining three options do not automatically gray out, nor do they become non-checkable. However, leaving those options checked after unchecking the Enable SharePoint Designer option is ignored by any site collections associated with that Web application and fails to launch in SharePoint Designer 2010. In other words, unchecking the Enable SharePoint Designer option overrules the three other options. However, you should be aware that if a site is already open in SharePoint Designer 2010 at the time Enable SharePoint Designer is deselected at the Web application level, you can continue working and changing the site. Unchecking this option appears to simply stop people from opening SharePoint Designer.
To access SharePoint Designer settings at the Web application level, follow the steps listed below:

**NOTE**

Same may be accomplished using PowerShell. However, in this example, I show you how to achieve results via the Web interface.

1. On the SharePoint Web front-end server, open the SharePoint Central Administration site.
2. On the home page of Central Administration, in the left-hand menu, click Application Management.
4. Click the Web application to which you want to apply SharePoint Designer settings, for example, SharePoint - 80.
5. In the ribbon, click the General Settings drop-down and click SharePoint Designer.
6. View available settings on the subsequent SharePoint Designer Settings dialog.
7. Click the X in the upper-right of the dialog to close and keep existing settings or uncheck one or more of the options and then scroll to the bottom of the dialog and click OK to save the updated settings. Remember, settings you choose at the Web application level are inherited by site collections under that Web application.

Table 7.2 summarizes each of the SharePoint Designer settings.

**TABLE 7.2 SharePoint Designer Settings Explained**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Associated Checkbox Description</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow SharePoint Designer in this Web Application</td>
<td>Enable SharePoint Designer</td>
<td>By unchecking this option, you effectively remove the option to edit sites within site collections under the current Web application in SharePoint Designer 2010 for all users, including site collection administrators.</td>
</tr>
<tr>
<td>Allow Site Collection Administrators to Detach Pages from the Site Template</td>
<td>Enable Detaching Pages from the Site Definition</td>
<td>Specify whether to allow site administrators to detach pages from the original site definition using SharePoint Designer. If you uncheck this option at Web application level, then site collection administrators, site owners, and designers are not able to modify pages created via the Web interface in SharePoint Designer. For instance, attempting to edit a Wiki page that has been created in the Wiki library in the Web interface is not possible and the option to Edit File in Advanced Mode is disabled.</td>
</tr>
</tbody>
</table>
If you choose to disable use of SharePoint Designer, either in entirety or in one or more of the settings, at the Web application level after users, including the site collection administrator, have started using SharePoint Designer 2010 to customize SharePoint sites, then you stand the risk of any current SharePoint Designer editing sessions continuing until such time as SharePoint Designer is closed on the client or the SharePoint Server is rebooted. Once again, you should carefully consider the choice to disable SharePoint Designer at the outset of a SharePoint deployment, and you should communicate changes to those currently using SharePoint Designer before disabling it.

### TABLE 7.2 SharePoint Designer Settings Explained

<table>
<thead>
<tr>
<th>Setting</th>
<th>Associated Checkbox Description</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Site Collection Administrators to Customize Master Pages and Layout Pages</td>
<td>Enable Customizing Master Pages and Layout Pages</td>
<td>Specify whether to allow site collection administrators to customize Master Pages and Layout Pages using SharePoint Designer. Unchecking this option removes the Master Page and Page Layouts tab from the navigation pane in SharePoint Designer. If a user attempts to access and edit master pages via the All Files, _catalogs, master page, folder then they will be challenged if they attempt to open a master page or page layout. However, if you have a site already open in SharePoint Designer 2010 and then disallow this option at the Web application level, it actually does take effect as soon as you return to your existing SharePoint Designer session. The Master Page and Page Layouts tabs disappear from the left navigation, and you are challenged if you attempt to edit a master page through the All Files route. However, if you already have a master page checked out and open when this setting is disabled, you are able to still edit, save, check in, publish major, and approve.</td>
</tr>
<tr>
<td>Allow Site Collection Administrators to See the URL Structure of Their Web Site</td>
<td>Enable Managing of the Web Site URL Structure</td>
<td>Specify whether to allow site administrators to manage the URL structure of their website using SharePoint Designer. Unchecking this option removes the All Files tab from the navigation pane in SharePoint Designer, which then avoids access to viewing a site’s files in entirety including hidden folders (those folders preceded by an underscore, such as _foldername.</td>
</tr>
</tbody>
</table>
Site Collection SharePoint Designer Settings

Depending on SharePoint Designer settings at the Web application level, site owners and designers (or members of the SharePoint Designers group, or users with the Design permission level) are able to use SharePoint Designer to edit SharePoint sites. If one or more SharePoint Designer options have been disabled at the Web application level, then those options are disabled and not accessible at the site collection level.

For example, in Figure 7.7, SharePoint Designer has been enabled at the Web application level, but the other three options have been disabled. In this scenario, site owners and designers are not able to access those related features in SharePoint Designer, such as editing master pages and page layouts. However, site collection administrators continue to have full access to the full suite of SharePoint Designer editing capabilities.

NOTE

If the Enable SharePoint Designer option is unchecked at the Web application level the other three options appear to remain active at the site collection level, but attempting to open sites in SharePoint Designer 2010 fails. This is also applicable to site collection administrators. This is because the Enable SharePoint Designer option is a prerequisite to availability of the other three options. Be aware that this is by design.

The SharePoint Designer settings at site collection level are the same as those at the Web application level, with one main exception. If SharePoint Designer is disabled at the site collection level then the site collection administrator is still able to launch site collection...
sites (Webs) in SharePoint Designer 2010 and access all SharePoint Designer settings. This is also applicable where other SharePoint Designer features have been disabled at the site collection level; site collection administrators continue to have full access to editing sites in SharePoint Designer 2010. In other words, if you totally want to lock down access to SharePoint Designer, including access for site collection administrators, you need to lock it down at the Web application level.

To access SharePoint Designer settings at the site collection level, follow the steps below:

1. With the root site of your SharePoint site collection opened in the browser, click the Site Actions button and then click Site Settings.
2. On the Site Settings page, under Site Collection Administration, click SharePoint Designer Settings.

Site User Permissions and SharePoint Designer
In addition to options for locking down access to SharePoint Designer at the Web application and site collection levels, you may also leverage user permissions for granting or denying access to SharePoint Designer. In order to open a SharePoint Site in SharePoint Designer, a user must be a member of the SharePoint Designers group, or be within a SharePoint group that has the Design permission level assigned to it. Alternatively, the Design permission level can be applied directly to the user irrespective of group membership, which provides the following rights: Add and Customize Pages, Apply Themes and Borders, Apply Style Sheets, and Use Remote Interfaces. Additionally, SharePoint Designer must be enabled at both the Web application and site collection levels. By default, when a Web application is created, SharePoint Designer is enabled.

To help determine the currently logged in user, SharePoint Designer 2010 includes the option to check the current user, as shown in Figure 7.8. This is useful for working between different permission scenarios when customizing and designing in SharePoint Designer and you want to check visibility and permissions on certain actions.

Clicking the user icon reveals the identity of the current logged in user as shown in Figure 7.9, and also includes the option to close out of your current session and log in as a different user.

If you are not a member of the SharePoint Designer group (nor have Design permissions otherwise) and attempt to open a site in SharePoint Designer 2010 then the Edit Site in SharePoint Designer menu option is absent. SharePoint Designer options in the ribbon, although still present, are disabled.

Behavior exhibited when leveraging user permissions for controlling access to SharePoint Designer differs to that when disabling SharePoint Designer at the Web
Where SharePoint Designer is disabled at the Web application or site collection levels, the Web interface options to edit in SharePoint Designer 2010, such as the option to Edit in SharePoint Designer via the Site Actions menu, are still present. Where a user has insufficient permission to edit sites in SharePoint Designer, those same SharePoint Designer editing options are absent or disabled, as shown in Figure 7.10 (the Modify View and Edit List options are disabled in the ribbon) and Figure 7.11 (the Site Action menu option to Edit Site in SharePoint Designer is absent).
If a user with insufficient permissions to edit a SharePoint site in SharePoint Designer attempts to independently launch a site in SharePoint Designer 2010 by directly opening the SharePoint Designer application from his own machine and then entering the site's URL, he receives the error dialog shown in Figure 7.12.

**SharePoint Foundation 2010 Permissions**

Unlike SharePoint Server 2010, in a SharePoint Foundation 2010 server there is no out-of-the-box SharePoint Designer group. However, there is a Design permission level, which equates to the same permission level assigned the SharePoint Designer group in SharePoint Server. If you are planning on leveraging user permissions to lock down access to SharePoint Designer in a SharePoint Foundation 2010 server you might consider creating a custom group named Designer for easy recognition and assignment.
Visual Behavior Based on SharePoint Designer Lockdown

Where SharePoint Designer has been disabled at the Web application level, a site collection administrator, site owner, or member of the Designer SharePoint group still sees the options to edit with SharePoint Designer in the Web interface. However, clicking one of those options results in a dialog as shown in Figure 7.13.

![Figure 7.13](image)

FIGURE 7.13 Visual result of locking down SharePoint Designer at the Web application or site collection level.

If SharePoint Designer has been disabled at the site collection level, site owners and members of the site’s Designer SharePoint group are met with the same dialog when attempting to open a site in SharePoint Designer.

**NOTE**

If SharePoint Designer has been disabled at either or both the Web application and site collection levels the options to edit sites in SharePoint Designer still appear in the SharePoint 2010 user interface, such as the Edit Site in SharePoint Designer option in the Site Actions drop-down menu. This is by design.

If the Enable Customizing Master Pages and Layout Pages option is disabled at the Web application level then site collection administrators, site owners, and members of the Designer SharePoint group see the dialog shown in Figure 7.14 when attempting to open a master page of page layout via the All Files tab in the navigation pane in SharePoint Designer.

![Figure 7.14](image)

FIGURE 7.14 Experience when attempting to open a master page where the option has been disabled for the Web application or site collection.
**Evolution of Web Design Tools**

SharePoint Designer 2010 supersedes SharePoint Designer 2007. However, unlike SharePoint Designer 2007, SharePoint Designer 2010 is specifically geared toward customizing and designing SharePoint 2010 sites and cannot be used for working with non-SharePoint sites. Similarly, SharePoint Designer 2010 cannot be used with SharePoint Server 2007 sites.

Since SharePoint Portal Server 2001, in which there were limited design capabilities, an abundance of tools have entered the SharePoint marketplace. SharePoint Portal Server 2003 saw FrontPage 2003 used extensively for customizing pages, designing pages, and adding logic via the DataView Web part. SharePoint Server 2007 saw the introduction of SharePoint Designer 2007 for designing and customizing SharePoint master pages, page layouts, other types of pages, and CSS files. Included in SharePoint Designer 2007, we suddenly had a common set of ASP.NET controls, such as the gridview control, which you could leverage for extending features such as integration with external databases including Access databases. We also saw third-party and open-source tools for integrating Silverlight and ASP.NET 3.5 functionality into SharePoint sites.

In SharePoint 2010, there is not only SharePoint Designer 2010, but also other rich design integration tools, including InfoPath Designer 2010 for designing SharePoint list forms, Visio 2010 for designing and integrating workflows with SharePoint Designer, and Visual Studio 2010. To complement the user interface opportunities in SharePoint 2010, there is also Microsoft Expression Blend for customizing the Silverlight Web part skin. In addition, ASP.NET 3.5 functionality is natively built into SharePoint, which enables you to more easily add Web 2.0 type functionality to your SharePoint sites. But the Web design tool story doesn’t end there.

If you’re contemplating prototyping SharePoint sites then a definite tool of choice is Microsoft Expression Blend 4 Sketchflow, which includes SharePoint 2010 integration options.

If you are still involved in working with and customizing non-SharePoint sites, then the tool of choice is either SharePoint Designer 2007 or Expression Web.

**Moving on from In-Browser Customization**

In Part I of this book, we looked at the various forms of customization that can be achieved via the Web interface, such as adjusting the navigational display levels within a SharePoint Server 2010 site. In fact, the Web interface customization options in SharePoint 2010 are extensible. However, now that you’ve had a chance to review those options you also probably have a better idea which areas you need to promote and work with in SharePoint Designer 2010.
As part of the Web interface to SharePoint Designer 2010 journey, it’s also useful to compare the value-add in terms of customizing sites. In addition, there are instances where you even need to go beyond SharePoint Designer 2010 to achieve a higher degree of customization, such as creating custom workflow activities in Visual Studio 2010. Table 7.3 compares the Web interface customizations discussed back in Part I to those discussed throughout Parts II through IV of this book to the equivalent in both SharePoint Designer 2010 and Visual Studio 2010.

<table>
<thead>
<tr>
<th>In-Browser Customization Scenario</th>
<th>SharePoint Designer Value-Add Example</th>
<th>Visual Studio 2010 Value-Add Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation: Modify top-level and Quick Launch menus, including removing, hiding, and adding new headings and links and adjusting the number of dynamic drop-down menu items; metadata-driven navigation in lists and libraries.</td>
<td>Reposition or remove navigational menus, customize dynamic top menu and left-hand menu item fly-outs, style the navigation.</td>
<td>Create new navigational and menu controls; integrate third-party navigation controls and extend.</td>
</tr>
<tr>
<td>Ribbon: Add the show or hide ribbon option in Site Actions drop-down.</td>
<td>Reposition ribbon on pages, add or remove ribbon scroll, remove ribbon entirely from master pages. Set a permission string around the ribbon to hide it from anonymous users.</td>
<td>Create Features to add custom ribbon commands or remove existing ribbon commands.</td>
</tr>
<tr>
<td>Master pages and page layouts: Change master pages, apply alternate CSS, and create new publishing pages in SharePoint Server 2010.</td>
<td>Create new SharePoint master pages and custom CSS files. Create new page layouts for publishing pages. Manipulate the ribbon and other features, such as the Developer Dashboard and navigation in custom master pages.</td>
<td>Build custom master pages and page layouts, add additional logic to master pages, and add custom navigational controls. Deploy as a solution to multiple site collections.</td>
</tr>
<tr>
<td>Forms: Replace existing list forms with InfoPath forms.</td>
<td>Create multiple ASPX and InfoPath forms for content types and lists.</td>
<td>Create custom solution including custom list forms for a multiple site collection deployment.</td>
</tr>
</tbody>
</table>
### TABLE 7.3 Extending Web Interface Customization Using SharePoint Designer 2010 and Visual Studio 2010

<table>
<thead>
<tr>
<th>In-Browser Customization Scenario</th>
<th>SharePoint Designer Value-Add Example</th>
<th>Visual Studio 2010 Value-Add Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflows: Leverage the out-of-the-box workflows for document approval routing.</td>
<td>Customize the out-of-the-box workflows. Create new list, site, reusable, and globally (site collection) reusable workflows. Build in powerful logic and style workflow emails. Associate workflows with InfoPath forms and export workflows to Visual Studio 2010.</td>
<td>Import SharePoint Designer 2010 workflows for additional logic building and customization and deploy to SharePoint server.</td>
</tr>
<tr>
<td>Site Templates: Save a non-publishing site as a WSP file and reuse the template throughout a site collection.</td>
<td>Add additional customization and style to the site before saving it as a site template.</td>
<td>Import a site template (WSP) file from SharePoint for additional customization and redeploy to one or more site collections using solutions and Features. Build custom site definitions.</td>
</tr>
<tr>
<td>Web parts: Leverage the Content Query Web Part for centralizing information and information roll-up, present data in the Silverlight Web Part, use the Content Editor Web Part for specific content presentation in Web part pages, leverage List View Web Parts in Web part pages, leverage Web part connections between Web parts on the same page.</td>
<td>Style the XSLT related to the Content Query Web Part, customize and style XSLT List View Web Parts, create DataView Web Parts, configure Web part connections across multiple pages within the same site.</td>
<td>Develop custom and functional Web parts.</td>
</tr>
<tr>
<td>Business intelligence: Leverage the business intelligence template in SharePoint Server to integrate and present PerformancePoint and SQL data, including KPIs and dashboards. Leverage Excel Services in SharePoint Server to publish and present Excel workbooks via the browser.</td>
<td>Create external data sources, including SQL, Representational State Transfer (REST), Web services, XML and linked data sources. Configure and create external content types and external lists to integrate with backend systems, including CRUD functions. Create custom dashboards.</td>
<td>Integrate SQL Integration Services, develop custom integration between SharePoint and Line of Business (LOB) systems such as SAP.</td>
</tr>
</tbody>
</table>
Opening SharePoint Sites in SharePoint Designer

Before we launch into analyzing the SharePoint Designer 2010 interface and features, the first thing we need to do is to open SharePoint Designer, which goes hand-in-hand with opening SharePoint 2010 sites. This section demonstrates how you can open existing SharePoint 2010 sites in SharePoint Designer 2010 and looks at how to work within the context of SharePoint sites and access site content in SharePoint Designer.

There are several ways to open SharePoint sites in SharePoint Designer 2010, as outlined in this section.

Launch SharePoint Designer Directly from the Client

This method assumes you are currently working independent of your browser or your browser is closed. In this scenario, you open SharePoint Designer 2010 directly from your client and then open your SharePoint site after SharePoint Designer 2010 has launched.

**NOTE**

The following demonstration assumes that SharePoint Designer 2010 is installed on your computer. If you’ve previously used SharePoint Designer 2010 then it might also show in your frequently used applications list when you click Start.

To open SharePoint Designer 2010 on your computer, follow the steps below:

1. Click Start and then click All Programs.
2. Next, click Microsoft Office and then click Microsoft SharePoint Designer 2010.

The screen shown in Figure 7.15 is also referred to as the Office backstage, a feature across the entire Office 2010 suite of applications. The backstage helps de-clutter the mainstream application interface and includes a common set of configurable application options. In SharePoint Designer, the backstage includes options for opening existing and creating new sites and pages, as well as setting application options and configuring application user interfaces such as the ribbon.

**Opening an Existing SharePoint Site from SharePoint Backstage**

To open a site from the SharePoint Designer backstage, click the Sites tab in the left-hand menu (if it is not already selected) and then either select a site from the Recent Sites
listing (refer to Figure 7.15) or click the Open Site button under Open SharePoint Site. Clicking the Open Site button displays a dialog as shown in Figure 7.16.

NOTE

The Recent Sites listing, shown in Figure 7.15, is only present if you have previously opened SharePoint sites in SharePoint Designer 2010.

FIGURE 7.15  Initial SharePoint Designer 2010 screen when opening from client.

NOTE

Using this method (shown in Figure 7.16) might show links to sites that have been deleted. Deleting sites via the Web interface does not automatically remove them from the Web folder or Web cache on the client.

FIGURE 7.16  Dialog served when opening an existing SharePoint site via the Open Site button on the SharePoint backstage.
Opening MySite
Also included under the Open SharePoint Site option is the option to Customize MySite. Clicking this button attempts to launch a user’s MySite in SharePoint Designer.

NOTE
If a user has not already created a MySite, then she is prompted with the dialog shown in Figure 7.17. However, in my testing, even if a user already had a MySite configured she also received the same prompt and the MySite failed to open. Instead, to customize her MySite, the user navigated to the MySite in the browser, such as http://server/my/personal/username, and was then able to open the site in SharePoint Designer via Site Actions, Edit in SharePoint Designer.

IMPORTANT
If MySites have been deployed as part of the base Web application, for instance SharePoint - 80, and SharePoint Designer has been disabled on that Web application then users are not able to launch their MySites in SharePoint Designer. If you are planning your SharePoint deployment then you should strongly consider creating a separate Web application to host your MySites. By doing that, you may then choose to allow users to edit their MySites in SharePoint Designer while at the same time locking down other Web applications.

Launch SharePoint Designer from a SharePoint 2010 Site
In SharePoint 2010, you may launch SharePoint Designer 2010 directly from the Web interface in one of several ways. One way is to launch SharePoint Designer via the Edit Site in SharePoint Designer option from the Site Actions menu or via the Internet Explorer Page menu.

NOTE
If you are not currently authenticated within the same domain as your SharePoint server, or your client machine is a member of a separate, non-trusted domain, then you are prompted for your credentials when opening a SharePoint site in SharePoint Designer 2010.
Launch SharePoint Site via Site Actions Menu

With SharePoint 2010 open in your browser, click the Site Actions menu to expand the drop-down menu and click the Edit Site in SharePoint Designer option, as shown in Figure 7.18. If you do not see the Edit Site in SharePoint Designer option in the Site Actions menu then check your permissions. You must be a member of the Designer SharePoint group, or be a member of a SharePoint group that includes the SharePoint Design permission level, in order to launch and work with sites in SharePoint Designer.

![Figure 7.18 Launch SharePoint Designer via the Site Actions menu in SharePoint 2010.](image)

**NOTE**

If you are an administrator or site collection administrator then the option to edit sites in SharePoint Designer still appears in the Site Actions menu even if SharePoint Designer 2010 is not installed on your computer. Where SharePoint Designer is not installed, clicking the Edit in SharePoint Designer option attempts to redirect you to download the application from the Microsoft download site.

Launch SharePoint Site via Internet Explorer

If you previously used SharePoint Server 2007 then you might have used the browser controls to launch a site in SharePoint Designer 2007. For instance, in Internet Explorer 8 or 9, you may use the Edit with Microsoft SharePoint Designer option on the Page menu, as shown in Figure 7.19. However, in my testing, I found that if the site is not already open in SharePoint Designer then using the browser edit option did not appear to always honor permissions and did not allow members of the Designer group (or members with
the Design permission) to open the site. Also, if the site is already open in SharePoint Designer then using the browser edit option actually opens the current page in edit mode.

**NOTE**

The option shown in Figure 7.19 assumes that you have SharePoint Designer 2010 installed on your client and configured as the default Web page editor. You can configure SharePoint Designer 2010 as the default Web page editor by going into SharePoint Designer's Application Options and configuring editors.

**Other SharePoint Designer User Interface Options**

When working in SharePoint 2010 sites within a browser, there are two other launch options for SharePoint Designer 2010, shown in Figure 7.20. These include the options

- **Modify View, Modify in SharePoint Designer (Advanced):** Choosing this option opens the currently navigated list or document library View page (for example, http://sitename/Shared%20Documents/Forms/Allitems.aspx) as an XSLT List View Web Part in SharePoint Designer 2010. You may then modify and enhance the View properties such as adding styling or conditional formatting.

- **Edit Library and Edit List buttons:** Clicking these buttons launches the respective list or document library setting page in SharePoint Designer 2010.

**NOTE**

Assuming you have the correct permission level, these options still appear within the ribbon even where SharePoint Designer 2010 is not installed. Clicking either option results in an attempt to download SharePoint Designer from the Microsoft download site.
Note on Opening Publishing Sites and Pages

If you’ve previously used SharePoint Designer 2007 to edit SharePoint Server 2007 sites then you are probably familiar with the prompt shown in Figure 7.21, which you received when attempting to launch the site in SharePoint Designer from the home page of the site within a browser, where that page was a publishing page. Instead, you needed to either edit the page via the browser or edit the corresponding publishing page layout in SharePoint Designer.

Although still present in SharePoint Server 2010 sites, this behavior has changed slightly in SharePoint Server 2010 when using the built-in editing controls in SharePoint 2010.

When opening a SharePoint Server 2010 site in SharePoint Designer 2010 from the home page, or other, of a site in the browser using the Site Actions option Edit Site in SharePoint Designer, where that page is a publishing page, you no longer receive the same dialog. Rather, the entire site opens in SharePoint Designer 2010.

However, if you attempt to directly open a publishing page via the browser, such as via the contextual drop-down menu in the Pages document library, as shown in Figure 7.22, SharePoint Designer 2010 opens but renders the dialog shown in Figure 7.21.

In addition, if you click the Edit site home page link under the Customization part on a publishing site’s setting page in SharePoint Designer 2010, you also receive the same dialog, as shown in Figure 7.23.
Opening Anonymous SharePoint Sites in SharePoint Designer

In an anonymous SharePoint Server 2010 site, provisioned using either the Enterprise Wiki or Publishing Portal site collection template, the Site Actions menu, along with the Edit in SharePoint Designer option, is hidden until an authenticated user logs in. In non-publishing and SharePoint Foundation 2010 anonymous sites, the Site Actions menu is visible but the option to Edit in SharePoint Designer is absent until an authenticated user logs in.
The visibility of the Site Actions menu and other ribbon artifacts also depends on the degree of site customization. See Chapter 17, “Creating New SharePoint Master Pages,” to learn how the ribbon is managed and can be customized on anonymous sites.

In addition, opening an external SharePoint site in SharePoint Designer from Internet Explorer might cause the security prompt shown in Figure 7.24.

**Opening SharePoint Sites Set to Basic Authentication**

If you attempt to open a SharePoint 2010 site in SharePoint Designer where the site is configured with basic authentication then you experience issues opening the site. If a site is set to basic authentication then you will see the addition of a warning message in the Windows Security dialog (using Internet Explorer 7, 8 or 9) at the time of attempted login, as shown in Figure 7.25.
After submitting login credentials, you see the dialog shown in Figure 7.26, which does not really suggest that the issue is due to basic authentication. I received the same dialog when attempting to log into multiple site collections configured with basic authentication.

In addition, you might also experience issues when attempting to perform other client interaction, such as saving a list to Excel or Access.

![Error received after attempting to open a site set to basic authentication.](figure7.26)

**FIGURE 7.26** Error received after attempting to open a site set to basic authentication.

### Exploring the SharePoint Designer Interface

Before creating new content and using some of the advanced features of SharePoint Designer, it's important you understand how the product works. Specifically, you need to be aware of the interaction between SharePoint 2010 sites and SharePoint Designer 2010. You also need to know how to navigate and access content within a SharePoint site.

**NOTE**

The following screenshots and discussion assumes you’re using a Site Owner login and have enabled SharePoint Designer at both the Web application and site collection levels, including all options.

### Anatomy of the SharePoint Designer User Interface

After you open a SharePoint site in SharePoint Designer 2010, the Site tab at the very top of the window, and next to the File tab, is active and the initial page, or screen, displays. As shown in Figure 7.27, key elements of the SharePoint Designer screen include a contextual ribbon, navigational elements, such as breadcrumbs and tabs, a navigation pane on the left of the screen, and the main settings page directly to the right of the navigation pane, which doubles as a workspace area for editing pages and modifying list and document library properties.

The settings page, just like the contextual ribbon, changes to display information based on the current selection within the navigation pane, such as Content Types, which list all of the current site's content types. The settings page also acts as the primary workspace for editing pages, such as master pages and CSS files.

The current site is highlighted in the left-hand navigation pane and the settings page reflects the settings specific to that site, including options for managing the site that we explore further in the following sections. In addition, the contextual ribbon includes
several options, including administrative options. Options in the ribbon change depending on location within SharePoint Designer and user permissions. There is a direct link between actions in the ribbon and actions in the navigation pane and settings/workspace section, so that the user is always kept in context with editing and configuration options specific to his current course of action.

Quick Access Toolbar (QAT) and Contextual Ribbon

Two key components within the SharePoint Designer 2010 user interface include the contextual ribbon and the Quick Access Toolbar (QAT), which has a default position immediately above the ribbon. Both of these components give you the option to access features related to the site and content. However, you may choose to modify the ribbon and the QAT to suit your environment. For instance, you might want to add to the QAT those features you tend to use more frequently or remove from the ribbon those features you tend to use less frequently. SharePoint Designer 2010 includes the ability to modify both components via the SharePoint Designer backstage.
**Customizing the Ribbon and QAT** To customize the ribbon and QAT, you need to access the SharePoint Designer 2010 backstage. Follow the steps below to access and customize the ribbon and QAT:

1. With SharePoint Designer 2010 open, click the File tab to access the backstage.
2. On the backstage, click Options in the left-hand menu.
3. In the subsequent SharePoint Designer Options dialog, click Customize Ribbon, as shown in Figure 7.28.

The Choose Commands From listing includes available commands that you can add into custom groups in the Customize the Ribbon listing immediately to the right. If you want to remove any of the existing tabs from the ribbon, you simply need to uncheck the respective checkboxes in the Customize the Ribbon listing. Removing options from the ribbon can also maximize your workspace area when you’re working in SharePoint Designer. For example, unchecking Lists and Libraries renders the page minus the ribbon, shown in Figure 7.29. However, remember that removing such a large segment of ribbon also removes those actions that you need to access when working within the current context, in this case, lists and libraries.

![Customize Ribbon options in SharePoint Designer.](image)
To add new items to the ribbon, we need to create a new tab, by doing the following:

1. Click the New Tab button directly below the Customize the Ribbon list.
2. Select the New Tab (Custom) option and, immediately below the Customize the Ribbon list, click the Rename button.
3. In the Rename dialog, type in a new Display name and click OK.
4. Next, click the New Group (Custom), directly below the new tab you just created, and click the Rename button.
5. In the Rename dialog, type a new Display name and click OK.

**NOTE**

Commands cannot be added to an existing, non-custom group. If you attempt to do so, then the dialog shown in Figure 7.30 displays.

**FIGURE 7.30** Dialog that displays when you attempt to add a command to a non-custom ribbon group.

**NOTE**

The symbols you see in the Rename dialog at this point do not relate to the group name. Rather, you can use them to replace the symbols against any custom commands you add to your custom group, as shown in Figure 7.31.
Next, making sure your new custom group is selected, choose a command from the commands list and click Add >> to add the command to the group. Click OK to save your customization and close the SharePoint Designer Options dialog.

**NOTE**

Be aware that the ribbon is contextual and therefore any commands you place within your custom group display in a disabled state when they aren’t in context, as with the Customize XSLT button shown in Figure 7.32.

The result of customizing the ribbon is shown in Figure 7.32, including the SharePointRus custom tab and the two custom groups, Common and Workflows. The Customize XSLT button is grayed because that option is out of context. Note also that a custom tab remains as a static tab, which is unlike tabs you select via the navigation pane, which only appear as required.
To remove the custom tab or group, or to remove commands from within a custom group, return to the Customize Ribbon dialog and uncheck the commands you want to remove. You can also select the custom tab or group, or command, and click the << Remove button. Alternatively, if you choose to remove all current ribbon customizations, click the Reset button located beneath the Customize Ribbon listing and select Reset All Customizations.

The customization option you just performed is specific to the current computer you are using. Imagine you have created custom tabs and groups and want to continue using that configuration on another machine. This can be achieved by saving the current configuration and then importing it into another instance of SharePoint Designer 2010.

**Exporting SharePoint Designer Ribbons**  To export a custom SharePoint Designer 2010 ribbon, go back to the Customize Ribbon dialog and click the Import/Export button below the Customize Ribbon listing. Select the Export All Customizations option. In the File Save dialog, add a filename, such as SharePointRus.exportedUI, select the save location, and then click OK.

**NOTE**

Exported customization filenames must be suffixed with .exportedUI.

When importing the exported customization file, follow the same procedure previously described, but choose the Import Customization File option from the Import/Export button.

The QAT provides a shortcut to regularly used commands in SharePoint Designer 2010. To customize the QAT, ensure the SharePoint Designer Options dialog is open. If it is not, click Options in the left-hand menu from the backstage. In the SharePoint Designer Options dialog, click Quick Access Toolbar in the left-hand menu. Unlike customizing the ribbon, you are not required to create a custom tab or group. Instead, you can select from the commands in the Choose Commands From listing and click the Add >> or << Remove buttons to add and remove commands to the QAT.

By default, the QAT sits above the ribbon. You can choose to position the QAT directly below the ribbon by checking the Show Quick Access Toolbar Below the Ribbon checkbox directly under the Choose Commands From listing.

As with the ribbon customization options, you have the options to reset the QAT to the default settings and import or export customized QAT settings.
Flexible Navigation Options

The main navigational areas within SharePoint Designer 2010 are the ribbon, settings/workspace area, and navigation pane. Immediately above the settings/workspace area is access to a tabbed and breadcrumb interface that you might use when accessing site content and working with and editing pages.

Breadcrumb and Current Tabs
The tabbed interface, shown in Figure 7.33, sits immediately above the settings/workspace page and remains consistent as you access content within a SharePoint site. Tabs highlight when selected and the associated breadcrumb, immediately below the tabs, displays the current path along with shortcut options to quickly access options respective to the current level. For example, in Figure 7.33 the Products list is our current location and we are able to access and work with common list features by selecting from the drop-down menu. Tabs are also draggable so you may conveniently change the order in which they are displayed. This is particularly useful when you have many site objects open and need to prioritize access.

You can close tabs by right-clicking a tab and selecting Close or Close All Tabs.

Maximizing the Workspace
The navigation pane to the left of the screen can be conveniently collapsed for maximum screen real estate, as shown in Figure 7.34.
Exploring the Navigation Pane

The navigation pane, shown in Figure 7.35, is the crux of locating and finding content within SharePoint Designer 2010. It is the springboard to accessing content such as a site’s lists and libraries, or other site artifacts such as master pages and page layouts, and it is...
available to the left of the screen for quick and easy access to site content irrespective of your current location within a site. As you click through tabs in the navigation pane, content specific to a selected tab appears in the settings/workspace area.

A lot of functionality available via the Web interface has been carried over to SharePoint Designer 2010, such as the ability to create new site columns and content types. Previously, in SharePoint Server 2007 and SharePoint Designer 2007, this functionality was only available via the Web interface, which meant working concurrently between SharePoint Designer and the browser to accomplish common site customization tasks.

To assist in accessing content via the navigation pane, it is possible to pin and unpin tabs so that related content “sticks” at the base of the pane instead of content appearing to the right of the navigation pane and disappearing from view as you select alternate tabs. This method helps you avoid reselecting a particular tab when you have content that you need to access on a regular basis, such as a site’s lists and libraries, but you want the flexibility to navigate through the other tabs.

To pin tabs in the navigation pane, right-click a tab and then click Pin, as shown in Figure 7.36. Similarly, to unpin a tab, right-click the currently pinned tab and then click Pin again.

Figure 7.37 shows the Data Sources tab pinned and the Master Pages tab currently selected. As you can see, the content related to the Data Sources tab remains stuck at the base of the navigation pane, which gives you the freedom to select other tabs and content while still maintaining access to content in the Data Sources tab.
Accessing Content via the Navigation Pane

This section covers each of the navigation pane tabs so you can begin to understand how to access various site components and how to access tasks and settings with each tab. An example of accessing content via the navigation pane is shown in Figure 7.38. In this scenario, the Lists and Libraries tab is selected in the navigation pane, which loads the current site’s lists and libraries to the right of the navigation pane. Level 1, or the initial tier, of settings includes tasks such as creating a custom list and list settings. Selecting list settings from Level 1 opens a new set of list-specific options in Level 2.

FIGURE 7.38  Sample scenario of accessing content via the navigation pane.
If you’ve previously used SharePoint Designer 2007, then this section might be of particular interest because accessing information in SharePoint Designer 2010 is very different to that of its predecessor and is a learning curve in itself.

**NOTE**

In each of the screenshots in this section, images have been scaled to ensure that the full extent of the ribbon specific to the selected option in the navigation pane is shown. The details shown in the ribbon assume the default ribbon and one that has not been customized.

**Home**

The home tab in the navigation pane (indicated by the little house icon) identifies the currently opened site, or site root, as shown in Figure 7.39, where you can access site administrative features, change site properties such as site name and site description, and view other site-related information in the settings page situated to the right of the navigation pane. Note, also, that the Site tab at the very top of the screen, and positioned above the ribbon, is currently selected. The default ribbon associated with the home tab includes predefined common commands and site administrative-related options.

![FIGURE 7.39 Home tab options.](image)

The following tasks can be accessed via the Home tab.
<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Information Settings</td>
<td>Settings page</td>
<td>Change site title. Note: This does not automatically change a site’s URL if on a subsite. Also, if you are on the root site of a site collection, although you can change the Title you may not change that site’s URL.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Change or add site description: Enter a description for the site.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Folder: Change URL of current site. This option is only available in Subsites. Note, a site URL in the root site of a site collection may not be changed. Applies to both SharePoint Server 2010 and SharePoint Foundation 2010.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View Web address (URL).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View SharePoint (server) version.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View IIS Server version.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View total (site) storage: Note: If viewing this at the root site of a site collection then storage amount relates to entire site collection.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View percentage of available storage used: This amount is only valid if a quota (amount) has been set on the site.</td>
</tr>
<tr>
<td>Customization</td>
<td>Settings page</td>
<td>Edit site home page: Note: If the home page of a site is a SharePoint Server 2010 publishing page, then clicking this option gives you the option of either editing the underlying page layout or editing the page in the browser.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Change site theme: Clicking this option launches Site Theme settings page in the browser, for example .../_layouts/themeweb.aspx.</td>
</tr>
<tr>
<td>Settings</td>
<td>Settings page</td>
<td>Display Quick Launch (menu).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable Tree View (menu).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enable site RSS feeds.</td>
</tr>
<tr>
<td>Permissions</td>
<td>Settings page/ribbon</td>
<td>Add users to SharePoint groups, create and assign permission level to SharePoint groups, delete SharePoint groups.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If situated in a subsite of a site collection then either disinherit or inherit permissions from parent.</td>
</tr>
<tr>
<td>Subsites</td>
<td>Settings page</td>
<td>Access subsites within a site collection, delete subsites, create new subsites. Also rename subsites and change the subsite’s URL.</td>
</tr>
<tr>
<td>New Web Part Page</td>
<td>Ribbon</td>
<td>Create a new Web Part page in the current site. When you select this option via the Home tab you are given the option to save the Web Part page in one of the Wiki Page libraries in the current site, such as the Site Pages library.</td>
</tr>
<tr>
<td>SharePoint List</td>
<td>Ribbon</td>
<td>Create a new list in the current site from one of the existing list templates.</td>
</tr>
</tbody>
</table>
Lists and Libraries

In SharePoint Designer 2010, unlike SharePoint Designer 2007, we have the option to work with existing and create new lists and document libraries, which means less dependency on using the browser while working with and customizing SharePoint sites.
Specifically, in SharePoint Designer 2010, we have the option to directly manipulate the style and logic of lists and libraries using XSLT, which we cover in Chapter 22, “Overview of XSLT List View and Data View and Data View Web Parts in SharePoint 2010,” and Chapter 23, “Working with XSLT List View Web Parts (XLVs).”

The Lists and Libraries tab, shown in Figure 7.40, provides access to all existing lists and libraries within a site, including any external lists, and access to subsequent settings pages for each list and library within the current site. I also refer to the settings page as the “gallery” page when accessing site objects such as lists and libraries.

![Figure 7.40 Lists and Libraries tab options.](image)

**NOTE**

External lists are related to working with external content types, part of the business connectivity services features integrated with SharePoint 2010 and SharePoint Designer 2010. Part IV covers working with external lists and external content types. Accessing external lists can also be achieved by selecting the External Content Types tab in the navigation pane; however, it is not as direct a route as selecting external lists via the Lists and Libraries tab.

You can access the following tasks via the Lists and Libraries tab.

**TABLE 7.5 Tasks Associated with the Navigation Pane Lists and Libraries Tab**

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lists</td>
<td>Settings/gallery page</td>
<td>Access lists within the current site. Access the setting page for each list and create new views, forms, workflows, and custom actions. Edit columns and manage content types and manage list settings.</td>
</tr>
</tbody>
</table>
Workflows

Workflows in SharePoint 2010 fall into three main categories:

- **List workflows**: Specific to a particular list or document library.
- **Site workflows**: Specific to a particular site within a site collection.
- **Reusable workflows (including globally reusable workflows that can be consumed throughout an entire site collection)**: A reusable workflow, unlike list or site workflows, can be saved as a (workflow) template and exported to Visual Studio 2010 for additional customization.

Selecting the Workflows tab in the navigation pane provides access to a site’s workflows and options to edit existing and create new workflows. Globally reusable workflows are accessible from any site within a site collection. As shown in Figure 7.41, the Workflows tab provides access to workflow-specific tasks, including creating new workflows, editing an existing workflow, and importing and exporting workflows to Visio 2010. Workflows are covered in detail in Part IV of this book.
You can access the following tasks via the Workflows tab.

**TABLE 7.6 Tasks Associated with the Navigation Pane Workflows Tab**

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Workflow</td>
<td>Ribbon</td>
<td>Create a new list-specific workflow.</td>
</tr>
<tr>
<td>Reusable Workflow</td>
<td>Ribbon</td>
<td>Create a new reusable workflow that can be promoted to a globally reusable workflow and consumed by all sites within a site collection or exported to Visual Studio 2010. A reusable workflow is associated with a content type.</td>
</tr>
<tr>
<td>Site Workflow</td>
<td>Ribbon</td>
<td>Create a (current) site-specific workflow. A site workflow is independent of content types.</td>
</tr>
<tr>
<td>Workflow Settings</td>
<td>Ribbon</td>
<td>Navigate to the settings page for the currently selected workflow.</td>
</tr>
<tr>
<td>Edit Workflow</td>
<td>Ribbon</td>
<td>Jump directly into a selected workflow to edit it, including workflow steps, actions and conditions, and other workflow-related settings.</td>
</tr>
<tr>
<td>Delete</td>
<td>Ribbon</td>
<td>Delete the currently selected workflow.</td>
</tr>
<tr>
<td>Save as Template</td>
<td>Ribbon</td>
<td>Save the currently selected workflow as a template in preparedness for exporting to Visual Studio 2010. Only a reusable workflow (excluding globally reusable workflows) may be saved as a template.</td>
</tr>
<tr>
<td>Copy and Modify</td>
<td>Ribbon</td>
<td>Copy an existing workflow as the basis for a new workflow. Only reusable and globally reusable workflows may use this option.</td>
</tr>
</tbody>
</table>
Site Pages

Selecting the Site Pages tab lists all of the current pages stored in the Site Page document library, including Wiki and Web part pages, as shown in Figure 7.42. Site Pages should not be confused with the Pages library, which is specific to the publishing functionality in SharePoint Server 2010.

NOTE

The Site Pages document library is based on the Wiki Page Library document template. By default, when a site is created from one of the out-of-the-box site templates, such as the Team site template or Enterprise Wiki site template (SharePoint Server 2010 only), the Site Pages document library is also created. The Site Pages library stores Wiki pages created in the site, including the home page if the Wiki Page Home Page Feature is activated. If you create additional Wiki page libraries then those libraries also show up in the navigation pane.

You can access the following tasks via the Site Pages tab.
TABLE 7.7  Tasks Associated with the Navigation Pane Site Pages Tab

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clipboard</td>
<td>Ribbon</td>
<td>Cut, Copy, and Paste functions. Also has a small button for opening the Clipboard task pane on the right of the screen.</td>
</tr>
<tr>
<td>Web Part Page</td>
<td>Ribbon</td>
<td>Create a new Web Part page within the current Wiki Page library.</td>
</tr>
<tr>
<td>Page</td>
<td>Ribbon</td>
<td>Create a new page of type ASPX or HTML. Note: You may not create new Wiki pages in SharePoint Designer 2010. Wiki pages must be created via the Web interface.</td>
</tr>
<tr>
<td>Folder</td>
<td>Ribbon</td>
<td>Create a new folder in the current Wiki Page library.</td>
</tr>
<tr>
<td>Page Settings</td>
<td>Ribbon</td>
<td>Redirects you to the settings page for a selected page for additional file information, editing options, permissions, and version history.</td>
</tr>
<tr>
<td>Edit File</td>
<td>Ribbon</td>
<td>Edit in Normal or Advanced Mode.</td>
</tr>
<tr>
<td>Edit File With</td>
<td>Ribbon</td>
<td>SharePoint Designer as HTML or as Text, or edit using Notepad.</td>
</tr>
<tr>
<td>Delete</td>
<td>Ribbon</td>
<td>Delete the currently selected page.</td>
</tr>
<tr>
<td>Rename</td>
<td>Ribbon</td>
<td>Rename the currently selected page.</td>
</tr>
<tr>
<td>Reset to Site Definition</td>
<td>Ribbon</td>
<td>Active if a page has been customized in SharePoint Designer 2010. Returns a page to the original site definition on the Web front-end server.</td>
</tr>
<tr>
<td>Set as Home Page</td>
<td>Ribbon</td>
<td>Make the currently selected page the home, or initial, page for the current site.</td>
</tr>
<tr>
<td>Administrative settings,</td>
<td>Ribbon</td>
<td>Various administrative-related settings for the currently selected page. Note, the check in and check out options are only active if the</td>
</tr>
<tr>
<td>including Preview in</td>
<td></td>
<td>Require Check-out option is enabled on the library.</td>
</tr>
<tr>
<td>browser, check in and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>check out options, import</td>
<td></td>
<td></td>
</tr>
<tr>
<td>and export files, and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Settings</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Site Assets**

The Site Assets library, shown selected in the navigation pane in Figure 7.43, not to be confused with the Asset, or digital Asset, Library, is specifically for storing functional file types, such as CSS, JavaScript, XML, and text files used in pages throughout sites. Image files may also be uploaded and stored in the Site Assets library. Workflow templates, that is, reusable workflows saved as templates, are saved to the site’s Site Assets library where the resultant WSP file can be exported, or saved, and imported into Visual Studio 2010.
An alternate location for storing global files, like CSS and XML files, is the Style Library which is located in the root site of a site collection. For example, you may choose to store your custom CSS files in the Style Library and then reference those CSS files in your custom master pages. The main difference between the Style Library and Site Assets library is that a Site Assets library is available within every site in a site collection. So if you have site-specific assets, or files, that are separate from the entire site collection then you would potentially use the Site Assets library for storing those assets.

**NOTE**

One Site Assets library is created when a new site, using one of the default site templates such as the Team site template, is created. Other libraries may also be nominated as Site Asset libraries. See Chapter 10, “Creating and Configuring Lists and Libraries,” for further information.

You can access the following tasks via the Site Assets tab.

**TABLE 7.8 Tasks Associated with the Navigation Pane Site Assets Tab**

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clipboard</td>
<td>Ribbon</td>
<td>Cut, Copy, and Paste functions. Also has a small button for opening the Clipboard task pane on the right of the screen.</td>
</tr>
<tr>
<td>Import Files</td>
<td>Ribbon</td>
<td>Import files, such as image files or CSS files, from another location.</td>
</tr>
<tr>
<td>Asset</td>
<td>Ribbon</td>
<td>Create a new CSS, JavaScript, XML, or Text file in the Site Assets library.</td>
</tr>
<tr>
<td>Folder</td>
<td>Ribbon</td>
<td>Create a new folder in the Site Assets library, for example to help categorize file types you add to the library</td>
</tr>
</tbody>
</table>
TABLE 7.8 Tasks Associated with the Navigation Pane Site Assets Tab

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Settings</td>
<td>Ribbon</td>
<td>Opens a settings page for the selected asset for access to file information, permissions, customization, and version history.</td>
</tr>
<tr>
<td>Edit File</td>
<td>Ribbon</td>
<td>Opens the file in its native default editor.</td>
</tr>
<tr>
<td>Edit File With</td>
<td>Ribbon</td>
<td>Offers editing options depending on file type.</td>
</tr>
<tr>
<td>Delete and Rename</td>
<td>Ribbon</td>
<td>Delete or rename the currently selected file.</td>
</tr>
<tr>
<td>Administrative options including</td>
<td>Ribbon</td>
<td>Various administrative features.</td>
</tr>
<tr>
<td>Preview in Browser, Administration Web</td>
<td></td>
<td>Page, Check In/Check Out, Export File, and Library Settings</td>
</tr>
</tbody>
</table>

Content Types

Selecting the Content Types tab provides access to all the site collection and site content types, as shown in Figure 7.44. If you are located within a subsite of a site collection, just as with working via the Web interface, you have the option to create new site-specific content types. Any changes you make to content types might also be pushed out to site collection sites and lists currently consuming those content types. In SharePoint Designer 2007, this functionality was not possible and it was necessary to access and modify content types via the Web interface.

NOTE

You may not edit a parent content type on a subsite. Attempting to do so causes the dialog shown in Figure 7.45 to display.
You can access the following tasks via the Content Types tab.

**TABLE 7.9  Tasks Associated with the Content Types Navigation Pane Tab**

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Content Type</td>
<td>Ribbon</td>
<td>Create a new content type within the current site. This content type is available to the current site’s subsites.</td>
</tr>
<tr>
<td>Content Type Settings</td>
<td>Ribbon</td>
<td>Opens the settings page for the currently selected content type, which includes access to content type information, option to edit the content type columns, and general settings. Note: This option is disabled if the current location is not the source location of the current content type. You may still click the file but are not able to edit it unless you navigate back to the source site.</td>
</tr>
<tr>
<td>Edit Columns</td>
<td>Ribbon</td>
<td>Edit the columns related to the currently selected content type.</td>
</tr>
<tr>
<td>Delete and Rename</td>
<td>Ribbon</td>
<td>Delete or rename the currently selected content type. Note: These actions are not possible where the selected content type is currently in use within the site or site collection.</td>
</tr>
<tr>
<td>Apply to List</td>
<td>Ribbon</td>
<td>Applies the currently selected content type to a list within the current site. Note: In order to apply to a list, the list’s Allow Management of Content Types setting must be enabled. This can be set by navigating to the respective list’s settings page.</td>
</tr>
</tbody>
</table>

### Site Columns

Selecting the Site Columns tab, shown in Figure 7.46, provides access to all the site columns available within the current site collection and options to create new site columns, change the data type in existing columns, add validation settings to existing columns, delete columns, and push changes made to existing columns out to lists currently consuming those columns.

You can access the following tasks via the Site Columns tab.
External Content Types

External content types are special content types connected to an external system, such as an SQL database and integrated with SharePoint sites. SharePoint Designer 2010 offers powerful configuration features for working with external content types, which we explore in Chapter 20.

One or more external lists may be associated with an external content type. Selecting the External Content Types tab provides access to existing external content types, as shown in Figure 7.47.
You can access the following tasks via the External Content Types tab.

### TABLE 7.11  Tasks Associated with the Navigation Pane External Content Types Tab

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New External Content Type</td>
<td>Ribbon</td>
<td>Create a new external content type connection to an external system, such as an SQL database.</td>
</tr>
<tr>
<td>New External List</td>
<td>Ribbon</td>
<td>Create a new external list to present data sourced by the external content type and display that data within a SharePoint site.</td>
</tr>
<tr>
<td>Edit External Content Type</td>
<td>Ribbon</td>
<td>Navigate to the settings page for the currently selected external content type.</td>
</tr>
<tr>
<td>Delete</td>
<td>Ribbon</td>
<td>Delete the currently selected content type.</td>
</tr>
<tr>
<td>Export Application Model</td>
<td>Ribbon</td>
<td>Exports the currently selected external content type in XML format that may be consumed and customized in other systems such as Visual Studio 2010.</td>
</tr>
</tbody>
</table>

### Data Sources

Selecting the Data Sources tab, shown in Figure 7.48, provides access to the site’s data sources, including existing lists, document libraries, external lists, XML files, any custom database connections, Web services, REST service connections, and linked data sources. Content sourced from data sources may be presented throughout sites in SharePoint by using such features as the Data View Web Part. Data sources are covered in detail in Chapter 19.

You can access the following tasks via the Data Sources tab.
Master Pages

Selecting the Master Pages tab, shown in Figure 7.49, provides access to all the current master pages available within the current site, along with access to editing options. We cover master pages in detail in Chapter 17, but provide a summary of options below.

You can access the following tasks via the Master Pages tab.

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linked Data Source</td>
<td>Ribbon</td>
<td>Create a linked query between two or more data sources. Includes options for merged or joined relationships.</td>
</tr>
<tr>
<td>Database Connection</td>
<td>Ribbon</td>
<td>Create a database connection to an SQL server. Note: In SharePoint Server 2010 an additional authentication protocol that uses single sign on is available, unlike in a SharePoint Foundation 2010 server, which does not include that option.</td>
</tr>
<tr>
<td>SOAP Service Connection</td>
<td>Ribbon</td>
<td>Connect to a Web service and retrieve data.</td>
</tr>
<tr>
<td>REST Service Connection</td>
<td>Ribbon</td>
<td>Retrieve data using REST protocol, such as ATOM and RSS feeds.</td>
</tr>
<tr>
<td>XML File Connection</td>
<td>Ribbon</td>
<td>Retrieve data from an existing XML file.</td>
</tr>
<tr>
<td>Copy and Modify</td>
<td>Ribbon</td>
<td>Copy an existing data source and configure it using different parameters, such as filtering and querying parameters.</td>
</tr>
</tbody>
</table>
### FIGURE 7.49 Master Pages tab.

### TABLE 7.13 Tasks Associated with the Navigation Pane Master Pages Tab

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clipboard</td>
<td>Ribbon</td>
<td>Cut, Copy, and Paste functions. Also has a small button for opening the Clipboard task pane on the right of the screen.</td>
</tr>
<tr>
<td>From Content Type</td>
<td>Ribbon</td>
<td>Create a new publishing master page. This option is specific to SharePoint Server 2010 and not available in a SharePoint Foundation 2010 server.</td>
</tr>
<tr>
<td>Blank Master Page</td>
<td>Ribbon</td>
<td>Create a generic, blank master page.</td>
</tr>
<tr>
<td>Page from Master</td>
<td>Ribbon</td>
<td>Create a new content page (ASPX) based on one of the available master pages within the site.</td>
</tr>
<tr>
<td>Page Settings</td>
<td>Ribbon</td>
<td>Redirects you to the settings page for the currently selected master page.</td>
</tr>
<tr>
<td>Edit File</td>
<td>Ribbon</td>
<td>Edit the currently selected master page. Note: When editing master pages, safe-editing mode is automatically overridden.</td>
</tr>
<tr>
<td>Reset to Site Definition</td>
<td>Ribbon</td>
<td>Active if the master page has been customized in SharePoint Designer 2010. Returns a page to the original site definition on the Web front-end server.</td>
</tr>
<tr>
<td>Edit File With, Delete and Rename</td>
<td>Ribbon</td>
<td>Edit with alternative applications, delete, or rename the currently selected file.</td>
</tr>
<tr>
<td>Set as Default and Set as Custom</td>
<td>Ribbon</td>
<td>Set the default master page for the site. This master page is automatically applied to any new pages created in the site. A custom master page is specific to SharePoint Server 2010 publishing sites.</td>
</tr>
</tbody>
</table>
Page Layouts

Specific to SharePoint Server 2010, the Page Layouts tab, shown in Figure 7.50, only appears if the current site is based on a publishing site template or if the SharePoint Server publishing Feature is enabled on the current site. Page layouts are covered in detail in Chapter 15.

![Page Layouts Tab](image)

**FIGURE 7.50** Page Layouts tab.

You can access the following tasks via the Page Layouts tab.

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Page Layout</td>
<td>Ribbon</td>
<td>Provides a dialog with options for creating a new page layout based on existing page layout and publishing content types.</td>
</tr>
<tr>
<td>Page Settings and Edit File</td>
<td>Ribbon</td>
<td>Launch the settings page or directly edit the currently selected file. Note: Check-out is required when editing publishing pages.</td>
</tr>
</tbody>
</table>

Site Groups

Site Groups in SharePoint Designer 2010 relate to SharePoint groups and site permissions. Selecting the Site Groups tab, shown in Figure 7.51, provides access to all the existing SharePoint groups within the current site, along with options for creating new SharePoint groups, adding and removing users, and assigning existing permission levels to groups. Again, this functionality is new to SharePoint Designer 2010. Previously, in SharePoint Designer 2007, it was necessary to modify settings such as SharePoint groups and group
membership via the Web interface. You can also access SharePoint permission settings via the Home tab settings page.

FIGURE 7.51 Site Groups tab.

You can access the following tasks via the Site Groups tab.

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add User to Group</td>
<td>Ribbon</td>
<td>Produces a dialog to add an existing user to one of the existing SharePoint groups. Allows adding multiple users and groups.</td>
</tr>
<tr>
<td>New Group</td>
<td>Ribbon</td>
<td>Create a new SharePoint group and assign a group owner.</td>
</tr>
<tr>
<td>Edit Group</td>
<td>Ribbon</td>
<td>Open a group’s settings page.</td>
</tr>
<tr>
<td>Make Default Group</td>
<td>Ribbon</td>
<td>The default group is automatically selected when adding new users.</td>
</tr>
<tr>
<td>View Group Permissions</td>
<td>Ribbon</td>
<td>View a selected group’s membership via the browser.</td>
</tr>
</tbody>
</table>
Subsites

Clicking the Subsites tab, shown in Figure 7.52, provides access to a site’s Subsites. Note that subsites are also accessible via the Home tab settings page.

![Subsites tab](image)

**FIGURE 7.52 Subsites tab.**

You can access the following tasks via the Subsites tab.

<table>
<thead>
<tr>
<th>Task</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save as Template</td>
<td>Ribbon</td>
<td>Save the selected site as a template file (WSP) for reuse within the current site collection or other, or import into Visual Studio 2010. This option is only available for non-publishing sites.</td>
</tr>
<tr>
<td>All Others</td>
<td>Ribbon</td>
<td>The Subsite button allows for creating new subsites and the Open Site button allows for opening selected sites in another instance of SharePoint Designer.</td>
</tr>
</tbody>
</table>

All Files

The All Files tab, shown in Figure 7.53, provides access to all files and folders, including hidden folders denoted by a prefixed underscore character, such as the _catalogs folder. This option is particularly useful when working with customizations such as themes (when you need to access theme files in the _catalogs/theme/themed folder). Themes are discussed further in Chapter 18.
NOTE

The All Files tab is not present if the Enable Managing of the Web Site URL Structure setting in the SharePoint Designer settings has been disabled at the Web application level. If the same setting has been disabled at the site collection level then site collection administrators still see the All Files tab.

Administering Sites in SharePoint Designer

This section focuses on performing administrative tasks specific to sites, such as site settings and site permissions. Just as with accessing information within sites, there are multiple entry points for performing administrative tasks. We look specifically at administering sites via the navigation tab Home settings page and via ribbon options.

Administer Sites via the Settings Page

The key administrative options are on the settings page, shown in Figure 7.54. They include modifying site information and permissions.

NOTE

Figure 7.54 shows the full complement of site settings as viewed by a site owner.

Modifying Site Information

You may change the title and description of the current site, but changing the title does not change the site’s URL. To change the title, simply click on the current title, or description, and enter a new title. However, be sure to save your changes or else any changes are lost when you navigate away from the page. Whenever you make changes to properties on a settings page, an * is visible in the currently selected tab immediately above the
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**FIGURE 7.54** Site Settings page in a site collection root site in SharePoint Designer 2010.

settings page, as shown in Figure 7.55. The * shown in the SharePointRus tab indicates pending changes and that you must save the current page or setting before the change/s is committed.

**FIGURE 7.55** Pending changes to site settings indicated by an * on the Site tab.

**NOTE**

You should also ensure that you check that any change you make to the site’s title is also reflected in the site’s navigational links.

The Total storage used, if at the root site of site collection, represents the storage for the entire site collection.
**Changing a Subsite URL in SharePoint Designer 2010**  Although you cannot rename the URL in the root site of a site collection, you may change the URL within a subsite of a site collection. Subsites’ settings pages include an additional item in the Site Information section, namely Folder, as shown in Figure 7.56. Clicking on the blue, hyperlinked text to the right of Folder enables you to type in a new name to replace the current URL when the change is saved.

![Figure 7.56](image)

**NOTE**

Assuming you are logged into SharePoint Designer with site owner and/or designer permissions, if you are working on a computer not currently part of the same domain as the SharePoint server or in a non-trusted domain, when attempting to change the URL of a subsite you might be prompted again for your credentials.

**Modifying Site Permissions**

Permissions involve adding and modifying SharePoint groups, adding permission levels to groups and adding users to groups. We can also access site permission options by selecting the Site Groups tab in the navigation pane.

The Permissions section on the Home tab setting page includes a New button as highlighted in Figure 7.57.

![Figure 7.57](image)
Clicking the New button enables you to add new users to an existing SharePoint group. In Figure 7.58, Craig Hughes is added to the Approvers group. In the Add Permissions dialog, you can change the group or give users direct access via one of the existing site permission levels, such as Design.

When you add a user to a SharePoint group, a subsequent confirmation dialog is presented, as shown in Figure 7.59.

Setting permissions in SharePoint Designer 2010 closely resembles setting permissions in the Web interface. Indeed, we can also verify that users added to groups via SharePoint Designer then show in the equivalent group in the Web interface, as shown in Figure 7.60.

You access additional permission settings, as shown in Figure 7.61, by clicking Permissions in the Permissions section on the settings page.
The Add Users/Groups option has the same effect as clicking the New button on the Permissions section of the Settings page. You can create a New SharePoint group and assign an owner to that group by clicking the Create Group button in the ribbon.

**NOTE**

Anonymous Access, Permission Levels, Access Requests, and Site Collection Administrators must be set via the Web interface. Clicking any of those options automatically redirects you to the appropriate Site Settings page in the browser.

Clicking an existing group under the Permissions tab and to the right of the navigation pane enables you to modify the permission level for that group, as shown in Figure 7.62.
Right-clicking an existing SharePoint group provides options to edit, delete, or go to the selected group’s settings (using the Properties option) page, as shown in Figure 7.63.

Selecting the Properties option provides access to the selected SharePoint group’s settings page, as shown in Figure 7.64 where the SharePointRus Members settings are displayed.

In the group settings page, you add new users or verify details on an existing user, as shown in Figure 7.65, by clicking the user’s name in the Members section on the setting page.

**Permission Inheritance and Disinheritance** As when working with site permissions via the Web interface, when working in a subsite in SharePoint Designer 2010, you have options to inherit or disinherit from the parent site permission set. In Figure 7.66, an additional option, Stop Inheriting, is present in the Permissions section on the site’s Home settings page.
FIGURE 7.64 SharePoint Group Settings page in SharePoint Designer 2010.

FIGURE 7.65 Verifying user details.

FIGURE 7.66 Permission inheritance in a subsite.
By clicking the Stop Inheriting button, we effectively break the current inheritance and create unique permissions for the current site, as confirmed in the dialog shown in Figure 7.67.

![Figure 7.67 Dialog served when disinheriting permissions.](image)

To re-inherit permissions from the parent, click the hyperlinked Permissions title on the Permissions tab on the site’s settings page. On the Permissions page, click the Inherit Permissions button in the ribbon’s Actions group (see Figure 7.68).

![Figure 7.68 Re-inheriting permissions from the parent site.](image)

**Administering Sites via the Ribbon**

In this section, we look at key administrative options available within the ribbon, as shown in Figure 7.69.

![Figure 7.69 Site administrative options within the ribbon.](image)
NOTE

Some administrative-related ribbon options, such as Administration Web Page, also appear in various navigation pane tabs. The following examples assume that the Home tab of the navigation pane is selected, which displays the primary set of site-related administrative options.

Table 7.17 summarizes the administrative options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Site</td>
<td>Exhibits the same behavior as in the Web interface and is grayed out if there are subsites present under the current site. You need to delete the subsites first.</td>
</tr>
<tr>
<td>Rename</td>
<td>Enables you to rename the current site. Note: This does not change the URL name.</td>
</tr>
<tr>
<td>Reset to Template</td>
<td>Returns a page that has been customized, (modified and saved in SharePoint Designer) back to its original source site definition template. A warning dialog is displayed. Clicking OK in the dialog then launches the browser at the <a href="http://sitename/_layouts/ghost.aspx">http://sitename/_layouts/ghost.aspx</a> page, which includes the option to reset a specific page or reset all pages in the current site to the original site definition.</td>
</tr>
<tr>
<td>Add Users/Groups</td>
<td>Shortcut to add users to the site’s permission groups.</td>
</tr>
<tr>
<td>Preview in Browser</td>
<td>Enables you to preview an existing page in a browser. Identifies installed browsers, including 32-bit and 64-bit browsers, and screen resolution. For example, if you have both Internet Explorer 8 and Firefox 3.5 installed the Preview in Browser list includes those browsers as preview options. It also only opens in the specified resolution if a version of that particular browser is not already open. If that browser version is already open it creates a new tab at the same resolution as existing tabs. Internet Explorer 6 is not supported.</td>
</tr>
<tr>
<td>Administration Web Page</td>
<td>Redirects you to the Site Settings page in the browser, for example http://site_name/_layouts/settings.aspx.</td>
</tr>
<tr>
<td>Save Site as Template</td>
<td>Save the current site, optionally with content, as a site template (WSP). Redirects you to the Save Site as Template page in the browser, for example http://site_name/_layouts/savetmpl.aspx. This option is not present in publishing sites (saving publishing sites as templates is not supported in SharePoint Server 2010).</td>
</tr>
<tr>
<td>Recycle Bin</td>
<td>Redirects you to the site’s Recycle Bin via the browser, for example http://site_name/_layouts/recyclebin.aspx.</td>
</tr>
<tr>
<td>Site Options</td>
<td>Enables you to manage some of the site settings, such as SharePoint Designer settings, separate from the Web interface.</td>
</tr>
</tbody>
</table>
Note on Saving Sites as Templates in SharePoint 2010

Chapter 8, “Creating Sites with Site Templates,” covers the differences between saving Team sites, or non-publishing sites, and publishing sites as templates. However, I felt it worthwhile to re-emphasize the fact that in SharePoint Server 2010 saving publishing sites as templates is not supported. This was also the case with SharePoint Server 2007; the behavior remains unchanged in SharePoint Server 2010.

Site Options

Site Options provides an alternative way to manage administrative settings, such as accessing SharePoint Designer settings as opposed to configuring those settings via the Web interface. For example, in Figure 7.70, the SharePoint Designer setting, Enable Customizing Master Pages and Layout Pages, has been disabled, or unchecked.

By clicking Site Options and accessing the Parameters tab, as shown in Figure 7.71, we are able to access the allowmasterpageediting parameter, which is equivalent to modifying the Enable Customizing Master Pages and Layout Pages settings in the Web interface. Clicking allowmasterpageediting displays the Modify Name and Value dialog. Changing the value from 0 to 1 and saving changes modifies the status of the equivalent setting in the Web interface.

More SharePoint Designer Configuration Options

So far, we’ve looked at a number of configuration options including SharePoint Designer settings and administrative features such as permissions. Early on in the chapter, we touched on the SharePoint Designer backstage, and we accessed the backstage Options to modify the SharePoint Designer 2010 ribbon and QAT. This section reviews the remainder of the configuration options available via the backstage, including setting SharePoint Designer editing preferences.

But first, you modify the Recent Sites listing, which by default does not include a built-in option for modifying the number of sites displayed.
Modifying the Recent Sites List in the SharePoint Designer Backstage

Depending on how frequently you use SharePoint Designer 2010 and the number of sites you access, eventually you might find that the Recent Sites listing on the SharePoint Designer 2010 backstage, shown in Figure 7.72, becomes cluttered.

FIGURE 7.71 Modifying SharePoint Designer settings via Site Options.

FIGURE 7.72 SharePoint Designer Recent Sites listing in backstage.
Unfortunately, there is no built-in tool for adjusting the contents of this list. However, one workaround is to manually remove items by using the following instructions:

1. On your computer, browse to the following location:
   \%SystemDrive\%\Users\<username>\AppData\Local\Microsoft\WebsiteCache

2. Remove the contents of the WebsiteCache folder to clear out the Recent Sites list in the SharePoint Designer 2010 backstage.

**NOTE**

Using this method might not be officially supported by Microsoft.

**General Options for Working with SharePoint Designer**

General options include configuration settings to adjust some of the common editing features in SharePoint Designer, such as the DOCTYPE and CSS Schema that you validate against when authoring SharePoint master pages, along with IntelliSense options when working in Code view. See Chapter 11, “Understanding SharePoint Designer Editing Features.”

**Summary**

In this chapter, you learned how to work within the context of SharePoint Designer 2010, including opening sites and navigation options available within the SharePoint Designer 2010 interface. Those of you upgrading from SharePoint Designer 2007 were introduced to the new options and learned about deprecated features. You also learned how to configure SharePoint Designer settings at both the Web application and site collection levels and how to navigate and access content and features via the navigation pane. Finally, you learned how to administrate sites within SharePoint Designer, including setting site permissions. This chapter discussed how to access common site objects via SharePoint Designer, including content types and site columns.

The next chapter delves further into working with SharePoint Designer to manage, create, and customize sites and site templates. You learn about the differences between creating sites in SharePoint Designer compared to creating sites via the Web interface, as well as how to package and deploy templates to site collections and Visual Studio 2010.
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