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Microsoft® SharePoint® Designer 2010

Step by Step

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

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

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

Thank you all!

—Penny Coventry
Is This the Right SharePoint Book for You?

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

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

**Buy This Book**

This book is for you if:

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

**Do Not Buy This Book**

This book is NOT right for you if:

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

**Important** SharePoint Designer 2010 connects only to SharePoint 2010 sites.
Introduction

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

- SharePoint Foundation is a free download that provides a collection of services that you can use to build sites. It is also a platform on which you can build applications. SharePoint Server is such an application, and all the features in SharePoint Foundation are available to SharePoint Server. SharePoint Server comes in a number of editions, all of which you can use with SharePoint Designer.

- SharePoint Server 2010 is used for intranet scenarios, in which either the Enterprise or Standard client-access license edition can be used.

- SharePoint 2010 for Internet Sites is available in the Enterprise or Standard edition. These editions can be used to build extranet Web sites.

- FAST Search Server 2010 for SharePoint is used to design enterprise search solutions.

- Office 365 brings together the 2010 editions of SharePoint Online, Exchange Online, Lync Online, and Office desktop software as a cloud service.

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

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

The eBook edition of this book allows you to:

- Search the full text
- Print
- Copy and paste

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

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

http://aka.ms/627338/files

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

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

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

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

### What’s on the Web?

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

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<th>Chapter</th>
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</tr>
</thead>
<tbody>
<tr>
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<td>Chapter 2, “Working with SharePoint Sites”</td>
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<tr>
<td>Chapter 4, “Creating and Modifying Web Pages”</td>
<td>SilverlightSPDSBS.xap</td>
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<td>Chapter 5, “Working with Data Views”</td>
<td>Use solution file site SPDSBSPracticeSite_Starter.wsp sale.png SPDSBS05.xsl.txt</td>
</tr>
<tr>
<td>Chapter 6, “Working with Data Sources”</td>
<td>Use solution file site SPDSBSPracticeSite_Starter.wsp Shipments.xml</td>
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<td>Chapter 7, “Using Business Connectivity Services”</td>
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<tr>
<td>Chapter 8, “Understanding Workflows”</td>
<td>Use solution file site SPDSBSPracticeSite_Starter.wsp</td>
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<td>Chapter 9, “Reusable Workflows and Workflow Forms”</td>
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<td>Chapter 11, “Working with Master Pages”</td>
<td>Use solution file site SPDSBSPracticeSite_Starter.wsp</td>
</tr>
<tr>
<td>Chapter 12, “Understanding Usability and Accessibility”</td>
<td>Index.aspx</td>
</tr>
<tr>
<td>Chapter 13, “Managing Web Content in the SharePoint Server Environment”</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 14, “Using Controls in Web Pages”</td>
<td>ADRotator.xml LucernePublishing.png WideWorldImporters.png ConsolidatedMessenger.png</td>
</tr>
</tbody>
</table>

**Minimum System Requirements**

This section details the requirements for both your computer—the client computer, where SharePoint Designer should be installed—and the requirements for a computer running SharePoint 2010—the server computer, where either SharePoint Foundation or SharePoint Server is installed. If you have access to an Internet service provider (ISP) that
hosts SharePoint for you or your company, or if your company has installed SharePoint on your corporate intranet, the details about the server requirements will be of little interest to you. Just ask your company for a SharePoint site that you can use while you are completing the exercises in this book, preferably a top-level site in your own site collection. If you currently have no access to a SharePoint site, the server computer requirements section that follows will help you create or get access to a SharePoint environment.

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

**Client Computer**

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

- **Processor** 500 MHz processor or higher.
- **Memory** 256 megabytes (MB) of RAM or higher.
- **Hard disk** For the eBooks and downloads, 3 GB of available hard disk space is recommended, with 2 GB on the hard disk where the operating system is installed.

.NET Framework 3.5 SP1 must be installed on the client machine, which is incorporated in Windows 7 and Windows Server 2008 R2 but not in other operating systems.

- **Drive** CD or DVD drive.
- **Display** Monitor with 1024×768 or higher screen resolution and 16-bit or higher color depth. Use of graphics hardware acceleration requires DirectX 9.0c–compatible graphics card with 64 MB or higher of video memory.
- **Software** Windows Internet Explorer 7 or later, or one of the supported browsers and Microsoft Silverlight. See the article “Plan browser support (SharePoint Server 2010)” at technet.microsoft.com/en-us/library/cc263526(office.14).aspx.

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

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

Client Software

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

- Microsoft Visio Premium 2010
- Microsoft InfoPath Designer 2010
- Microsoft Outlook 2010
- Microsoft Access 2010
- 20 MB of available hard disk space for the practice files

Server Computer

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

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

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

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

Processor  64-bit; four-cores.

Memory  8 GB for development or evaluation use.

Software  80 GB for installation

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

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

Using the Practice Files for the Exercises

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

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

Practice Files  Before you can use the practice files in this chapter, you need to copy the book’s practice files to your computer. The practice files you’ll use to complete the exercises in this chapter are in the Chapter08 practice file folder. A complete list of practice files is provided in “Using the Practice Files” at the beginning of this book.
SET UP Using SharePoint Designer, open the site you created from the SPDSBSPracticeSite_Starter.wsp practice file.

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

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

Uploading the Solution WSP File

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

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

1. Click Site Actions, and click Site Settings to display the site settings page.
2. Under Galleries, click Solutions to display the Solutions page.
   
   Note If you see a Go To Top Level Site Settings link under Site Collection Administration, you are not on the top-level site administration page. A site template can only be uploaded to the Solutions gallery on a top-level site. Click Go To Top Level Site Settings, and then repeat the previous step.
3. On the ribbon, click the Solutions tab, and then click Upload Solution to display the Solutions Gallery: Upload Solution dialog box.
4. Click the Browse button to display the Choose File to Upload dialog box.
5. Navigate to the folder that contains the solution .wsp file, click SPDSBSPracticeSite_Starter.wsp, and then click the Open button.
6. Click OK.

The Solutions Gallery—Activate Solution dialog box is displayed.
7. On the View tab, click Activate to redisplay the Solutions page.
Creating a Site from the Solution WSP File

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

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

1. Click Site Actions, and then click New Site.
   In SharePoint Foundation, the New SharePoint Site page is displayed. In SharePoint Server, a Create page is displayed.

2. Complete the following step depending the version of SharePoint that is installed:
   a. On SharePoint Foundation, on the Custom tab of the Select a template list, select SPD2010SBS_PracticeSite_Starter.
   b. On SharePoint Server, in the left pane, under Filter By, click Custom, and then select SPD2010SBS_PracticeSite_Starter.

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

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

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

5. Click Create.
   The home page of the new practice site is displayed.

CLEAN UP Close the browser.

Removing the Solution Files

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

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

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

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

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

The Solutions Gallery—Deactivate Solution dialog box appears.

4. On the View tab, click Deactivate.

5. Point to the site template you want to remove, click the arrow that appears, and then click Delete. You are prompted to confirm your request. Click OK to complete the deletion and display the Solutions gallery.

6. Repeat steps 3 through 5 to remove each site template that you no longer want to be available for creating practice sites.

CLEAN UP Close the browser.

Deleting a Practice Site

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

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

1. On the Site Actions menu, click Site Settings to display the site settings page.

2. In the Site Actions section, click Delete this site to display the Delete This Site confirmation page.

3. Click the Delete button to delete the site.

4. On the Delete This Site warning page, click Delete.

CLEAN UP Close the browser.

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

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

Getting Help with This Book

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

http://aka.ms/627338/files

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

mspinput@microsoft.com

Getting Help with Microsoft SharePoint Designer

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

support.microsoft.com

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

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

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

support.microsoft.com/common/international.aspx
Features and Conventions of This Book

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

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

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

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>SET UP</td>
<td>This paragraph precedes a step-by-step exercise and indicates the practice files that you will use when working through the exercise. It also indicates any requirements you should attend to or actions you should take before beginning the exercise.</td>
</tr>
<tr>
<td>CLEAN UP</td>
<td>This paragraph follows a step-by-step exercise and provides instructions for saving and closing open files or programs before you move on to another topic. It also suggests ways to reverse any changes you made to your computer while working through the exercise.</td>
</tr>
<tr>
<td>1</td>
<td>Numbered steps guide you through hands-on exercises in each topic, as well as procedures in sidebars and expository text.</td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>See Also</td>
<td>This paragraph directs you to more information about a given topic in this book or elsewhere.</td>
</tr>
<tr>
<td><strong>Troubleshooting</strong></td>
<td>This paragraph alerts you to a common problem and provides guidance for fixing it.</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Tip</strong></td>
<td>This paragraph provides a helpful hint or shortcut that makes working through a task easier or information about other available options.</td>
</tr>
<tr>
<td><strong>Important</strong></td>
<td>This paragraph points out information that you need to know to complete a procedure.</td>
</tr>
<tr>
<td><strong>Keyboard shortcut</strong></td>
<td>This paragraph provides information about an available keyboard shortcut for the preceding task.</td>
</tr>
<tr>
<td><strong>Ctrl+Tab</strong></td>
<td>A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, “Press <strong>Ctrl+Tab</strong>” means “hold down the <strong>Ctrl</strong> key while you press the <strong>Tab</strong> key.</td>
</tr>
<tr>
<td><strong>Bold</strong></td>
<td>In exercises that begin with SET UP information, bold type displays text that you should type; the names of program elements, such as buttons, commands, windows, and dialog boxes; and files, folders, or text that you interact with in the steps.</td>
</tr>
</tbody>
</table>
Part 1

Getting Started with Microsoft SharePoint Designer 2010

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Chapter at a Glance

Use SharePoint Designer to explore a Web page, page 20
Use task panes, page 26
Create a site, page 8
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Chapter at a Glance

- Change the title, description, and theme of a site, page 38
- Manage site users and permissions, page 41
- Create a site hierarchy, page 45
- Reset a site template, page 49
- Explore a SharePoint site, page 52
In this chapter, you will learn how to

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

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

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

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

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

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

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


Using a browser on a SharePoint Server publishing site or on a site where the Publishing feature is enabled, you can create your own new themes and push them down to subsites or inherit a theme from the parent site. However, you can apply a theme to only
one site by using the browser on SharePoint Foundation sites, on SharePoint Server sites that do not have the Publishing feature enabled, or when you use SharePoint Designer.

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

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

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

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

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

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

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

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

   **Tip** You can modify the URL of your site by clicking the text to the right of Folder, unless the site is the top-level site of a site collection. If that is the case the URL of the site cannot be modified and the Folder option is not displayed in the Site Information area.
4. On the Quick Access Tool bar, click **Save**.
The site settings page is refreshed, and the tab label changes to *Human Resources* with no asterisk. In the Navigation pane, the site object is labeled *Human Resources*, as is the ScreenTip that appears when you hover the mouse over the site name.

5. In the **Customization** area of the site settings page, click **Change site theme**. If prompted, type your user name and password, and then click **OK**.
A browser window opens and displays the Site Theme page.

6. In the **Select a Theme** section, click **Azure**, and then click **Apply**.
The Processing page is momentarily displayed before the site settings page is displayed, with the Azure theme applied.

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

7. Under **Look and Feel**, click **Site theme**.
The Site Theme page is displayed.

8. In the **Select a Theme** section, click **Default (no theme)**, and then click **Apply**.
The site settings page is displayed, with no theme applied.

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

---

**Publishing Features**

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

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

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

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

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

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

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

SET UP Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open. The settings page for the site should be displayed.
1. In the **Permissions** area of the workspace, click **Stop Inheriting**. A Microsoft SharePoint Designer dialog box opens.

2. Click **OK** to confirm the change. The dialog box closes. In the Permissions area, the Stop Inheriting button is replaced by New. A list of the SharePoint groups and users is copied from the parent site and mapped to the same permission levels as on the parent site.
   
   **Note** The Permissions column in the Permissions area references permission levels.

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

4. Click **OK** to confirm the change. The Viewers SharePoint group is not listed under Permissions.

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

6. In the **Choose users or groups to add** text box, type the user name or e-mail address of the user to whom you’d like to grant permissions, such as **todd**.
   
   **Tip** You can use the Check Names or the People Picker icon to ensure you enter a valid user name.

7. Under **Add users to a SharePoint group**, click the group you noted earlier that was mapped to the Contribute permission, such as **Wide World Importers Members**.
Important Editing a site group affects the membership of all sites, lists, folders, and items that are using that site group.

8. Click **OK** to close the **Add Permissions** dialog box. A Microsoft SharePoint Designer dialog box opens.

9. Click **Yes** to view the membership of the group. A new workspace tab opens and displays the settings page of the site group you added the user to. In the Members area is a list of all users who are a member of this site group, including the user you added in this exercise.
10. Click the **Log In As** button in the status bar in the SharePoint Designer window.

11. Click **OK** in the **Log in as another user** dialog box that opens.

12. In the **Windows Security** dialog box that opens, type the user name and password of the user you granted permissions to earlier in this exercise, and then click **OK**. A Microsoft SharePoint Designer dialog box opens stating that you do not have permission to open this Web site in SharePoint Designer.

   ![Microsoft SharePoint Designer dialog box](image)

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

13. Click **OK**.

   Backstage view is displayed.
CLEAN UP Close SharePoint Designer.

Creating a Site Hierarchy

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

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

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

Typically, in a site collection that will host a number of collaboration SharePoint sites such as blogs, document workspaces, and meeting workspaces, the top-level site of the site collection is based on the Team Site template. This top-level site could be the focal site for an entire team or department. The team or department members might have only read access to this top-level site, with a limited number of them who contribute content to the site, and one or two who act as site collection owners. As child sites are created, the number of team members who have access to the site decreases, and the proportion of members who can create and update content increases.
Chapter 2  Working with SharePoint Sites

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

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

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

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

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

2. Type team_meeting over Subsite. In the central pane, click Basic Meeting Workspace.
3. Click OK.

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

The new site opens in a new SharePoint Designer window.

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

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

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

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

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

The asterisk on the workspace tab disappears.

7. Click the **File** tab.

Backstage view is displayed.

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Site Name</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buyer's Team Meetings</td>
<td><a href="http://wideworldimport/supervisory/">http://wideworldimport/supervisory/</a>...</td>
</tr>
<tr>
<td>Group Work Site</td>
<td><a href="http://wideworldimport/supervisory/">http://wideworldimport/supervisory/</a>...</td>
</tr>
</tbody>
</table>

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

### Deleting a SharePoint Site

Deleting a SharePoint Site

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

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

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

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

The Subsites gallery page is displayed in the workspace.
6. Right-click **Buyers Team Meeting**, and click **Delete Site**.

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

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

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

---

**Resetting a Site Template**

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

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

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

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

1. On the Site tab, click Reset to Template in the Actions group.
   The Reset To Site Definition dialog box is displayed.

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

3. Select Reset all pages in this site to site definition version, and then click Reset.
   A Message From Webpage dialog box opens.
4. Click **OK**.

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

---

**Complications of Upgrading Customized SharePoint Sites**

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

As previously noted, SharePoint sites are different from other sites because they use site templates during the site creation process, and these site templates point to site definition files on the Web server. Customizing these site definition files was easier with SharePoint Designer 2007. During the upgrade process, when Microsoft modifies its site definitions on the Web server to include new functionality, you might not see the new functionality, depending on the pages you customized. For example, the ribbon is implemented as a control on the master page; therefore, if you customized your site’s master page, the ribbon will not be available to you. Other customizations can also affect the upgrade process, so during the upgrade planning process you need to identify any customizations on your SharePoint sites and test to see the effect the upgrade process might have on them.
If you are involved in the upgrade process, you can do one of the following with your customized pages after your site is upgraded to SharePoint 2010:

- Leave the customized page as a customized page. If the customized page is a master page, pages associated with that master page will always look like a Windows SharePoint Services 3.0 or SharePoint Server 2007 page.

- Reset the customized page to the now-upgraded site definition files or pages stored on the server file system. You lose all the customizations you made to your page, and you can decide whether to reapply that customization by using SharePoint Designer 2010. This process can involve a great deal of time and effort. For example, if customizing a page takes 15 minutes and you have 100 pages, you need to allow 25 hours to customize these pages.


Exploring a SharePoint Site

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

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

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

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

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

   The workspace displays the gallery page displaying each list or library for your site, and the workspace tab is labeled Lists And Libraries. The Lists And Libraries tab on the ribbon contains commands to create new lists and libraries and to edit the list.
2. In the **Navigation** pane, hover over **All Files**, and click the Always Show pin that appears.

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

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

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

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

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

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

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

The Announcements list expands, exposing an Attachments subfolder (if attachments are enabled) and a number of Web pages that correspond to views created for the list and forms used to insert, edit, and display the properties of a list item.
5. In the workspace, in the **Lists and Libraries** gallery, under **Lists**, click **Announcements**.

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

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

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

The gallery page for lists and libraries is displayed.

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

The workspace tab is labeled **Shared Documents**, and the workspace now contains the settings page for Shared Documents, which is similar to the settings page for the Announcements list. As with lists, you cannot see the metadata for documents loaded into this document library. You must use the browser to see the metadata associated with the documents.
8. In the **Navigation** pane, click the up arrow to the right of **Site Objects** so that the mini-gallery is displayed the full length of the **Navigation** pane. Then click the – sign to the left of **Announcements**.

   The Announcements list collapses.

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

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

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

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

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

    The mini-gallery closes.

**CLEAN UP** Close SharePoint Designer.
Navigating a Site’s Components

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

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

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


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

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

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

1. In the Navigation pane, click Content Types.
   A new workspace page opens with a tab labeled Content Types and displays the gallery page for content types.

2. In the workspace, click the down arrow in the Group column heading, and then click Document Content Types.
The gallery page displays only those content types that are Document content types. The source column defines where the content types are defined. If your team site is not the root of a site collection, the source column is likely to be the Web address of the site collection.

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

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

The workspace now contains the settings page for the Document content type. The Content Type Settings tab on the ribbon contains commands to edit and manage the Document content type, and the mini-gallery lists all content types.
4. On the ribbon, click **Edit Columns** in the **Edit** group.

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

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

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

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

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

The Navigation pane collapses, and the workspace expands.

7. On the breadcrumb, click the arrow to the right of **Content Types**, and then click **Basic Page**.
The workspace now contains the settings page for the Basic Page content type. Notice on the ribbon that the Edit Document Template command is active. The Basic Page content type is used to create a document library, and therefore it can have a document template association.

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

Troubleshooting If the Site Columns gallery page contains no site columns, the filter you placed earlier on the Group column (in step 2) is still active. Click the arrow in the Group column, and click **All**.
9. Click the arrow at the top of the Navigation pane to expand the pane.

CLEAN UP Close SharePoint Designer.

Saving and Using a Site Template

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

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

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

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

Site template solutions are based on files stored on the Web server, which means that if you copy the site template to a site collection on another server, that server must have those site definition files installed. For this reason, many people who design solutions use the team site or the blank site as their basis for creating site template solutions because these site definition files are installed with SharePoint Foundation and SharePoint Server.
Similarly, if your lists or libraries use any site collection custom content types, those content types must be re-created in the destinations site collection’s Site Content Type gallery. The same is true for features that may be installed and enabled.

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

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

<table>
<thead>
<tr>
<th>Template</th>
<th>Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. STS</td>
<td>0 Team Site</td>
</tr>
<tr>
<td></td>
<td>1 Blank Site</td>
</tr>
<tr>
<td></td>
<td>2 Document Workspace</td>
</tr>
<tr>
<td>2. MPS</td>
<td>0 Basic Meeting Workspace</td>
</tr>
<tr>
<td></td>
<td>1 Blank Meeting Workspace</td>
</tr>
<tr>
<td></td>
<td>2 Decision Meeting Workspace</td>
</tr>
<tr>
<td></td>
<td>3 Social Meeting Workspace</td>
</tr>
<tr>
<td></td>
<td>4 Multipage Meeting Workspace</td>
</tr>
</tbody>
</table>

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

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

In this exercise, you use SharePoint Designer to create a site template, save the site template and review its contents, and then create a site from a site template and test your solution.
SET UP  Using SharePoint Designer, open the team site you used in previous exercises in this chapter, if it is not already open. The settings page for the site should be displayed.

1. On the Site tab, click **Save as Template** in the **Manage** group.
   The browser opens. If prompted, type your user name and password, and click **OK**. The Save As Template page is displayed.

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

3. In the **Include Content** section, select the **Include Content** check box, and then click **OK**.
   The Operation Completed Successfully page is displayed, stating that the Web site was successfully saved to the Solutions gallery.

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

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

6. Navigate to the **Desktop**, and then click **Save**.
   The Save As dialog box closes. If the Download Complete dialog box opens, click Close.

7. On your Desktop, rename SPDSBS_Sites.wsp as **SPDSBS_Sites.cab**.
   A Rename warning dialog box opens, stating that the file might become unstable.

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

9. Double-click **SPDSBS_Sites.cab** to open the cabinet file, locate **Elements.xml** in the **SPDSBS_SitesWebTemplate** path, and drag it to your desktop.
   **Tip**  You might have to change the Explorer view to Details to see the path.
10. Right-click Elements.xml, and click **Edit with Microsoft SharePoint Designer**. SharePoint Designer displays Elements.xml in the workspace.

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

11. In the **Navigation** pane, click **Subsites**.
A new workspace tab opens, labeled **Subsites**.

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

**Note**: There is no visible difference between using site template solutions and site templates stored on the Web server.
13. Type **SiteTest** over Subsite, and in the central pane, click **SPDSBS_Sites**.

14. Click **OK**.

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

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

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

**CLEAN UP** Close SharePoint Designer.

**Key Points**

- The SharePoint site properties Title and Description communicate to users the purpose and function of a site. They are also fundamental to making information easy to find.

- Themes can be created using PowerPoint 2010. The .thmx file is then loaded in the Themes gallery at the top-level site of a site collection.

- Themes change the colors and fonts used on a site. If you want to change other design elements, such as font size or spacing, you need to use cascading style sheets.

- Cascading style sheets used on SharePoint sites can be created to not support themes.

- A number of features can be activated at the site-collection level, whereas others can be activated on a site-by-site basis.

- You can use SharePoint Designer to create and manage SharePoint groups and map users and SharePoint groups to permission levels for sites, lists, and libraries.

- You cannot change the site template used to create a SharePoint site after the site is created. If the functionality you require is not exposed by a feature, you have to delete and re-create the SharePoint site using a different site template.

- You can delete child sites of a site collection by using SharePoint Designer; however, you cannot delete the top-level site of a site collection. Deleted sites are not sent to the Recycle Bin.

- You can reset customized (unghosted) pages to be uncustomized pages that point to site definition files on the Web server.

- Site components such as site columns and content types can be managed using SharePoint Designer.
● The hidden URL structure of a Web site can be viewed in the All Files mini-gallery.

● You can use site template solution files to package your solutions so that you can use them again. These files are stored in the SQL Server database and are exposed in the Solutions gallery at the top-level site of a site collection.

● Site template solution files are cabinet files with the extension .wsp. These cabinet files contain a number of files that describe how to create a site that includes your customizations.
Chapter at a Glance

- Insert hyperlinks, page 110
- Work with Web Parts, page 114
- Create list form pages, page 125
- Attach a master page, page 134
4 Creating and Modifying Web Pages

In this chapter, you will learn how to

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

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

This chapter focuses on Wiki pages and Web Part pages, building on the information in Chapter 1. You’ll learn to use the SharePoint Designer ribbon to add static content such as text, ScreenTips, hyperlinks, and images. You’ll learn that Wiki pages and Web Part pages are instances of Microsoft ASP.NET 2.0 content pages and that any SharePoint content page can contain one or more Web Parts. You’ll also learn how to change the appearance of a Web page by adding Web Part zones, the containers for Web Parts. And you’ll learn to manage Wiki pages and Web Part pages by applying permissions, manipulating the versions of these pages, and deleting pages.
Tip You can create Web Part pages by using SharePoint Designer. Creating Wiki pages with SharePoint Designer, although not impossible, is complex. Copying an existing Wiki page or using the browser to create a Wiki page are the most efficient methods.

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

Inserting Text, ScreenTips, Hyperlinks, and Images

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

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

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

- **Image conversion** When you insert an image that is not a GIF or JPEG, SharePoint Designer by default converts the file to GIF or JPEG format, depending on the number of colors in the original image. After you insert an image, you can reformat it in SharePoint Designer by using commands on the Picture Tools, Format tab and in the Picture Properties dialog box.

- **Auto thumbnail** You can tell SharePoint Designer to create a small version of an image—a *thumbnail*—and link it to the full-size image that it represents by right-clicking an image and then clicking Auto Thumbnail. Alternatively, select the image and press Ctrl+T.
Tip You can configure the settings for both these image manipulation options by using the Picture and AutoThumbnail tabs on the Page Editor Options dialog box.

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

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

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

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

1. In the Navigation pane, click Site Pages. The Site Pages gallery page is displayed in the workspace.

2. Click the icon to the left of Home.aspx. On the Pages tab, click Copy and then click Paste in the Clipboard group. The file Home_copy(1).aspx appears in the Site Pages gallery page.

3. On the Pages tab, click Edit File to open the page in edit mode, and then click the arrow to the right of Navigation on the Navigation pane. The Navigation pane collapses, providing you with more area in the workspace to modify the page.

4. Right-click anywhere within the PlaceHolderMain region, and then click Zoom to Contents.
5. Select the text **Welcome to your site!**, and type **Wide World Importers Human Resources team site**.

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

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

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

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

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

The Set Hyperlink ScreenTip dialog box opens.

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

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

The Target Frame dialog box opens.

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

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

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

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

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

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

13. On the Quick Access Toolbar, click Save.

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

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

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

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

### Working with Web Parts

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

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

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

**See Also** For more information about Web Parts, see Chapter 20, “Web Parts and Their Functionality in SharePoint Server 2010,” in *Microsoft SharePoint Server 2010 Administrator’s Companion* by Bill English, Brian Alderman, and Mark Ferraz (Microsoft Press, 2011).
A common mistake made by companies new to SharePoint is to spend thousands of dollars and hours of time developing custom Web Parts when one of the built-in Web Parts would meet their business needs. This is especially true given that SharePoint Designer allows you to create a Data View Web Part (DVWP), also known as a Data Form Web Part (DFWP), which is similar to the XLV Web Part and can be used to display and modify data from data sources such as a Microsoft SQL Server database.

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

Web Parts are also classified by where they are located:

- **Dynamic Web Parts** By using SharePoint Designer or the browser, you can place these Web Parts in the EmbeddedFormField SharePoint control on Wiki pages or in Web Part zones on Web Part pages. Dynamic Web Parts are stored separately from the page, and only when a user requests the page is the SQL Server content database queried to determine the number of dynamic Web Parts, which Web Parts are being used, where to place them on a page, and, if the page contains Web Part zones, in which Web Part zone the Web Parts should be placed.

- **Static Web Parts** These Web Parts are placed outside the EmbeddedFormField SharePoint control or outside Web Part zones. Static Web Parts can be created by using SharePoint Designer in advanced edit mode, but they cannot be created by using the browser. Static Web Parts are stored as part of the page.

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

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

1. Place the insertion point on a new line under the text, **Wide World Importers Human Resources team site**, that you added to the page in the previous exercise, and then click **Web Part** on the **Insert** tab.
2. On the **Web Part** menu, click **Silverlight Web Part**. The WebPartPages:SilverlightWebPart control is added to the page. On the Quick Tag Selector, the orange WebPartPagesSilverlightWebPart tag appears.

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

4. Under **Appearance** in the **Title** box, type **SPD Silverlight**. Under **Height**, select **Yes**, and type **40**.
5. Click **OK** to close the **Silverlight Web Part** dialog box.

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

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

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

7. In the workspace, click **Shared Documents**. On the **List View Tools, Design** tab, click **Options** in the **Toolbar** group, and then click **Full Toolbar**.
The Shared Documents Web Part reloads and the full toolbar is displayed.

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

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

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

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

A browser window opens and displays the Silverlight Web Part with a Web Part title of **SPD Silverlight**. The Shared Documents XLV Web Part is not displayed on the page.
Tip: Closed Web Parts can increase the time it takes for a browser to load the page. Keep the number of closed Web Parts to a minimum and only close a Web Part when you want to temporarily hide a Web Part and its customizations. In the browser, you can find closed Web Parts by first placing a page in edit mode. Then, on the Editing Tools, Insert tab on the server ribbon, click Web Part, and under Categories, click Closed Web Parts. The Closed Web Parts category appears only if the page contains closed Web Parts. Alternatively, append ?contents=1 to the URL of the page, such as http://wideworldimporters/SitePages/Home.aspx?contents=1, to display the page’s maintenance page.

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

The Silverlight Web Part is removed from the page.

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

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

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

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

Changing the Home Page for a Web Site

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

Once a SharePoint site is created, you can change the home page by using SharePoint Designer or, on a site on which the Publishing feature is enabled, from the site settings page. When you need to completely redesign your home page, you should create your new home page by using a different page than the page that is the current home page. Once you complete your redesign, you can then make your new page the home page of your site.
Assuming that you save your new page in the Site Pages library, there are several ways to complete this task:

- On the Site Pages gallery page, select your new page and then, on the Pages tab, click Set As Home Page in the Actions group.
- On the Site Pages gallery page or mini-gallery, right-click your new page and then click Set As Home Page.
- In the All Files gallery page or mini-gallery, navigate to where your new page is stored, right-click your new page, and then click Set As Home Page.
  
  **Note** You need to have the rights to view the hidden URL structure of the Web site to use this method of completing the task.

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

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

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

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

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

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

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

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

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

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

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

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

   The All Pages view of the Site Pages library is displayed.
6. Under the **Name** column, click **Home** to display the Home.aspx page.

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

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

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### Modifying a List View Page

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

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

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

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

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

**SET UP** Using SharePoint Designer, open the team site you used in the previous exercise if it is not already open.
1. In the **Navigation** pane, click **Lists and Libraries**, and then click **Tasks**.
The tasks list settings page is displayed in the workspace. In the Views area, six view pages are listed: Active Tasks, AllTasks, By Assigned To, By My Groups, Due Today, and My Tasks.

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

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

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

4. On the **Options** tab, click **Add/Remove Columns** in the **Fields** group.
The Displayed Fields dialog box opens.

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

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

7. Click **OK** to close the **Displayed Fields** dialog box.
Creating List View Pages

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

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

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

Creating List View Pages

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

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

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

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

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

2. On the List Settings tab, click List View in the New group.
The Create New List View dialog box opens.

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

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

![Create New List View dialog box](image)

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

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

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

The ByModified view appears in the Views area.

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

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

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

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

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

The Sort And Group dialog box opens.

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

9. Repeat step 8 to add **Modified** and **FileSize**.

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

![Sort and Group dialog box]

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

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

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

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

   The site settings page is displayed in the workspace.

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

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**Creating and Modifying a List Form Page**

When lists and libraries are created, they provide a number of built-in view pages. They also provide pages you can use to create new list items, edit and display existing list items, upload documents, create a new document, and edit and display metadata associated with documents. These pages are known as **form pages**. Like view pages, form pages consist of one Web Part zone named Main and one Web Part. These pages are displayed as dialog boxes transposed over view pages. However, if you enter the URL of a form page in the browser, you can modify it by using the browser.
View pages use an XLV Web Part, whereas most of the default form pages use a Web Part named the List Form Web Part (LFWP). In SharePoint Designer or the browser, the LFWP customization options are very limited. Unlike the XLV Web Part on view pages, the LFWP does not provide tabs similar to the List View tabs on the ribbon, so you cannot control the order in which fields are displayed or whether a field should appear.

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

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

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

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

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

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

1. In the **Navigation** pane, click **Lists and Libraries**, and then under **Lists**, click **Tasks**.
   
The tasks list settings page is displayed in the workspace. The Forms area contains three forms: DispForm.aspx, EditForm.aspx, and NewForm.aspx. The Type column indicates the type of form (Display, Edit, or New) and whether the forms are the default forms for their type.

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

2. In the **Forms** area, click **NewForm.aspx** to open the page in edit mode, and then click **[Preview of List Form Web Part]**.
A blue border with the label Main appears, within which is the label <webpartpages:ListFormWebPart>. This indicates that an LFWP is contained within the Web Part zone Main. A purple-bordered surrounds the Web Part zones, labeled PlaceHolderMain (Custom). The ribbon contains the Web Part Format tab.

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

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

4. In the File Name box, type NewTask.

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

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

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

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

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

The table cell that contains the Priority list is selected.

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

The Split Cells dialog box opens.

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

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

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

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

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

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

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

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

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

**CLEAN UP** Leave SharePoint Designer open if you are continuing to the next exercise.
Creating an ASP.NET Page

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

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

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

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

See Also Master pages are described in Chapter 11, “Working with Master Pages,” and customizing publishing pages in Chapter 13, “Managing Web Content in the SharePoint Server Environment.”
If you want to create a Web page in SharePoint Designer, you could copy an existing page, as you did earlier in this chapter. Otherwise, you need to create an ASP.NET page, associate a master page, and then insert Web Part zones (thereby creating a Web Part page) or insert the controls that make the page a Wiki page.

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

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

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

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

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

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

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

3. On the Pages tab, click Edit File.

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

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

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

5. On the workspace status bar, click Split.

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

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

CLEAN UP Leave SharePoint Designer open if you are continuing to the next exercise.
Inserting a Web Part Zone

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

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

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

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

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

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

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

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

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

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

   The Web Part Zone Properties dialog box opens.

5. Below **Browser settings for Web Parts contained in the zone**, clear the three check boxes.
6. Click **OK** to close the **Web Part Zone Properties** dialog box, and then on the Quick Access Toolbar, click **Save**.

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

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

### Attaching a Master Page

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

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

**See Also** Changing the default master page is described in Chapter 11, “Working with Master Pages.”
In this exercise, you attach a page to the site's master page.

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

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

![Attach](image)

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

The Select A Master Page dialog box opens.

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

![Select a Master Page](image)

3. Click **OK**.

The Match Content Regions dialog box opens.
4. Click **OK** to accept the default setting of associating all the code within the HTML `<body>` tags of the current page, OfficeFurniture.aspx, to the content region, PlaceHolderMain on the master page.

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

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

**CLEAN UP** Leave SharePoint Designer open if you are continuing to the next exercise.
Managing Web Pages

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

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

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

- **File Information**  Provides key information about the file, such as file name, created by, last modified by, file version, check in/check out status, and whether the file is based on a file from the site definition or has been customized.

- **Customization**  Use to edit the file or manage the file properties in the browser.

- **Permissions**  Use to manage the permission settings for the file. By default, the file inherits its permissions from the list it is stored in, and the list commonly inherits its permissions from the site. As with the site settings page, you can use the Permissions area on the file settings page to stop inheriting permissions, thereby creating unique permissions for the file. Then you can add or remove users or SharePoint groups and configure the access rights of those users and groups to the file by using permission levels.

- **Version History**  Use to restore and delete versions of a file. The version numbers are hyperlinks that open the File Version Summary dialog box. Both the Site Pages and the Pages libraries are configured with versioning enabled. The Site Pages document library uses major versions.

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

**See Also**  Managing publishing pages is detailed in Chapter 13.
When a file’s setting page is displayed, the Page tab is visible on the ribbon. This tab allows you to edit, delete, and rename the file; reset the file to the site definition; set the file as the site’s home page; check in, check out, and undo the check out of the file; and preview the file in the browser. You are also given a choice of programs in which to edit the file. Any deleted files are stored in the Recycle Bin, from which you can restore them.

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

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

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

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

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

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

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

3. Right-click the icon to the left of **1.0**, and click **Restore Previous Version**.
A dialog box opens warning you that the file must be checked out before a previous version of the file can be restored.

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

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

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

The Check In dialog box opens.

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

The Check In dialog box closes.

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

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

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

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

9. Click Yes to confirm the deletion.

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

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

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

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

Key Points

- On Wiki pages, only the content within the EmbeddedFormField SharePoint control can be modified using a browser, and on Web Part pages, only content within Web Part zones. In SharePoint Designer in advanced mode, you can modify content outside these areas.

- In the Page Editor Options dialog box, you can configure picture conversion formats, auto thumbnail creation, and settings for Design and Code views.

- Web Parts can be inserted outside Web Part zones and the EmbeddedFormField SharePoint control on content pages and on master pages by using SharePoint Designer. These are known as static Web Parts. Web Parts inserted into Web Part zones or the EmbeddedFormField SharePoint control are known as dynamic Web Parts. Details of dynamic Web Parts are stored in the SQL Server database separate from content pages and master pages.

- View pages and form pages both consist of one Web Part zone (named Main) and one Web Part. In the case of a view page, the Web Part is an XLV. In the case of a form page, it is an LFWP.

- You can create a custom data entry form by using a DFWP.

- A nonpublishing page is the combination of two ASP.NET pages: a master page and a content page.
A SharePoint Server publishing page is a combination of three ASP.NET pages: the master page, a page layout, and a content page. You cannot modify a publishing content page by using SharePoint Designer; you must use the browser. However, you can modify the master page and page layout by using SharePoint Designer.

Design view for a content page shows the merged view of the master page and the content page, whereas Code view shows only the code of the content page.

In SharePoint Designer, you can create an ASP.NET page and then attach a master page to give it the look and feel of the SharePoint site.

Any pages or files you delete in SharePoint Designer are sent to the Recycle Bin, from which you can restore them.

SharePoint Designer saves all pages to the SQL Server content databases. You can reset pages to site definition pages if they originally pointed to them.
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About the Author

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

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

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