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# Beginning SharePoint® Designer 2010

Woodrow W. Windischman, Asif Rehmani, Bryan Phillips, Marcy Kellar

# **Table of Contents**

**[Title Page](#)**

**[Copyright](#)**

**[Dedication](#)**

**[About the Authors](#)**

**[About the Technical Editors](#)**

**[Credits](#)**

**[Acknowledgments](#)**

**[Introduction](#)**

**[Who This Book Is For](#)**

**[What This Book Covers](#)**

**[How This Book Is Structured](#)**

**[What You Need to Use This Book](#)**

**[Conventions](#)**

**[Source Code](#)**

**[Errata](#)**

**[p2pwrox.com](http://p2pwrox.com)**

**[Part I: The Lay of the Land](#)**

## **Chapter 1: Exploring SharePoint Designer**

**What Is SharePoint Designer 2010?**

**All in the Family**

**A Backstage Pass**

**Digging for Artifacts**

**Governing SharePoint Designer**

**Summary**

## **Part II: Let's Get Visual**

### **Chapter 2: Editing Pages**

**What's in a "Page"?**

**Using Task Panes and Ribbon Tabs to Get Work Done**

**Summary**

### **Chapter 3: The Anatomy of a SharePoint Page**

**How SharePoint Pages Work**

**Page Types**

**Master Pages**

**Creating Custom Master Pages**

**Example Scenarios**

**Summary**

### **Chapter 4: Publishing Pages**

**Web Content Management Overview**

[\*\*Getting Started with Publishing\*\*](#)  
[\*\*Publishing Pages\*\*](#)  
[\*\*Putting it All Together\*\*](#)  
[\*\*Summary\*\*](#)

## [\*\*Chapter 5: Styles and Themes\*\*](#)

[\*\*Style Defined\*\*](#)  
[\*\*SharePoint Designer's CSS Tools\*\*](#)  
[\*\*Styling Your Site\*\*](#)  
[\*\*Summary\*\*](#)

## [\*\*Part III: Data Galore\*\*](#)

## [\*\*Chapter 6: Lists, Libraries, & Internal Content Types\*\*](#)

[\*\*Sharing Your Documents and Data\*\*](#)  
[\*\*Built-In Lists and Libraries\*\*](#)  
[\*\*Customizing Lists and Libraries\*\*](#)  
[\*\*Sorting, Filtering, and Grouping\*\*](#)  
[\*\*Structuring Your Data with Content Types\*\*](#)  
[\*\*Summary\*\*](#)

## [\*\*Chapter 7: Data Sources and External Content Types\*\*](#)

[\*\*Getting at Your Data\*\*](#)  
[\*\*Lists and Libraries\*\*](#)  
[\*\*Databases\*\*](#)  
[\*\*XML Files\*\*](#)

[\*REST-Based Web Services\*](#)  
[\*SOAP-Based Web Services\*](#)  
[\*Business Connectivity Services\*](#)  
[\*Joining Your Disparate Data\*](#)  
[\*Summary\*](#)

## [\*Chapter 8: XSLT Data Views and Forms\*](#)

[\*Two Types of Web Parts to Work with Data\*](#)  
[\*Managing Views of Data\*](#)  
[\*Creating Custom Forms\*](#)  
[\*Summary\*](#)

## [\*Chapter 9: InfoPath Integration\*](#)

[\*The Path to Gathering Info\*](#)  
[\*Customizing SharePoint List Forms\*](#)  
[\*Customizing SharePoint Library Forms\*](#)  
[\*Summary\*](#)

# [\*Part IV: Taking Action\*](#)

## [\*Chapter 10: Web Part Connections\*](#)

[\*Types of Web Parts\*](#)  
[\*Creating a Composite User Interface\*](#)  
[\*Summary\*](#)

## [\*Chapter 11: Workflow Basics\*](#)

[\*Ways to Create Workflows in SharePoint\*](#)

**[SharePoint Designer 2010 Workflow Elements](#)**

**[Automating Processes Using SharePoint Designer 2010 Workflows](#)**

**[SharePoint Designer 2010 Workflow Considerations](#)**

**[Summary](#)**

## **[Chapter 12: Advanced Workflows](#)**

**[Modeling Workflows Using Visio 2010](#)**

**[Working with Visio 2010 Workflows in SharePoint Designer 2010](#)**

**[Customizing Workflow Forms with InfoPath 2010](#)**

**[Built-In Global Workflows](#)**

**[Exporting Workflows as a Package](#)**

**[Summary](#)**

## **[Chapter 13: Client-side Programming in JavaScript](#)**

**[The Client Object Model](#)**

**[Getting Started](#)**

**[Retrieving Data Using CAML](#)**

**[Querying Document Libraries](#)**

**[Managing List Items](#)**

**[Managing User Custom Actions](#)**

**[Summary](#)**

## **Chapter 14: Client-side Programming in Silverlight**

**Why Silverlight?**

**Getting Started**

**Retrieving Data Using Silverlight**

**Managing Lists and Libraries**

**Managing Files and Folders**

**Managing Navigation**

**Limitations**

**Summary**

## **Appendix A: A Brief History of SharePoint and SharePoint Designer**

**From FrontPage to SharePoint Designer**

**The SharePoint Family Tree**

**Gathering MOSS—Windows SharePoint**

**Services 3.0 and Microsoft Office**

**SharePoint Server 2007**

**Continuing Evolution—SharePoint**

**Foundation 2010 and SharePoint Server**

**2010**

## **Appendix B: Just What Is SharePoint Anyway?**

**A Default SharePoint Home Page**

**SharePoint Content: Lists, Libraries, and More**

**Web Parts**

**Managing a SharePoint Site**

# **Architectural Background On the Server**

## **Index**



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*For my new family Brenda, Justine, and Drew. Everything I do from here on out is all for you.*

*—Woody Windischman*

*To my wife Anisa for always supporting me and being my own personal idea generator.*

*—Asif Rehmani*

*This book is dedicated to the memory of Larry Page who lived every day as if it were his last and showed everyone that you are never too old to learn something new.*

*—Bryan Phillips*

*To my son, Austin, for believing in me. To my mom and dad for their patience.*

*—Marcy Kellar*

# ***About the Authors***

**Woody Windischman** is a technology trainer and consultant with more than 20 years' experience in a variety of roles, allowing him to see problems holistically and come up with appropriate solutions. His experience in SharePoint-related technologies started even before SharePoint became a product, with predecessors such as Site Server, the Digital Dashboard Resource Kit, and the earliest versions of Microsoft FrontPage. Since then, Woody's been deeply involved in the SharePoint community—first having been awarded Microsoft SharePoint MVP from October 2005 through September 2007, and again in 2009. He spent a year working directly for the SharePoint product team. He's active on Twitter (as WoodyWindy) as well as several other online SharePoint communities, including the TechNet and MSDN forums. His SharePoint blog, [www.thesanitypoint.com](http://www.thesanitypoint.com), has been based on SharePoint for almost its entire existence.

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**Asif Rehmani** has been training and consulting on primarily SharePoint technologies since 2004. He is a SharePoint Server MVP and MCT. Asif runs a SharePoint Videos website ([www.sharepoint-videos.com](http://www.sharepoint-videos.com)), which

provides no-code video tutorials on SharePoint, SharePoint Designer, and InfoPath. Some of his videos have also been published and appear at Microsoft's TechNet site. Asif also provides in-person and online SharePoint training publicly and in private workshops through Critical Path Training ([www.criticalpathtraining.com](http://www.criticalpathtraining.com)). Over the years, Asif has been a speaker on SharePoint topics at several conferences, including Microsoft's TechEd, SharePoint Conference, SharePoint Connections, and Advisor Live. He is also the co-author of the books *Professional SharePoint Designer 2007* and *Real World SharePoint 2010* by Wrox publications. Asif was the co-founder and is currently one of the active leaders of the Chicago SharePoint User Group ([www.cspug.org](http://www.cspug.org)).

**Marcy Kellar** is SharePoint User Experience Architect and co-founder of SharePoint Soapbox. She is a strong advocate for user-centered implementation of SharePoint. She has an extensive background in visual design, web content management, relational data modeling, and life sciences. Marcy is an active member in the SharePoint community and frequent presenter. She has a bachelor's degree in Life Sciences from Indiana University. She pursues hobbies passionately and is award-winning photographer and fine artist.

# ***About the Technical Editors***

**Reza Alirezaei** MVP, MCP, MCPD, MCIPT, and MCTS for SharePoint 2010, is a solution architect focused on designing custom applications with SharePoint, Office, and Microsoft Business Intelligence products and technologies. As a technical leader with over 10 years of experience in software, he has helped many development teams design and build large-scale, mission-critical applications. In addition to consulting, Reza is an instructor and speaker. He speaks in many local and international conferences. Reza achieved the status of Microsoft Most Valuable Professional (MVP) for SharePoint in 2006, which he still is today. He has also co-authored *Professional SharePoint 2010 Development* and *SharePoint 2007 Reporting with SQL Server 2008 Reporting Services*. His blog can be found at <http://blogs.devhorizon.com/reza> and he tweets on Twitter under the alias @RezaAlirezay.

**Coskun Cavusoglu** has been designing and implementing technology solutions for more than 10 years in both large, enterprise organizations and fast-growth midmarket firms, and is currently a Senior Architect in the Customer Solutions practice at West Monroe Partners. Coskun has completed SharePoint projects for over 100 clients, one of them being Microsoft, where he was a part of the team that wrote the questions for the SharePoint 2007 Developer Certification exams. Coskun has authored two books on SharePoint: *Professional Microsoft® SharePoint® 2007 Design* and *Professional Microsoft SharePoint 2007 Reporting with SQL Server 2008 Reporting Services* published by Wrox Publishing. He is currently working on a new book, *SharePoint 2010 Developer Certification Study Guide*. In addition, Coskun also is a speaker who attends various community events both local and international,

where he talks about various SharePoint topics, and his past and future engagements can be found at his blog, [www.sharepointcoskun.com](http://www.sharepointcoskun.com). Coskun is a Microsoft Certified Professional and is also a MCTS for SharePoint technologies.

**Ryan Keller** has been working with SharePoint technologies since 2007 and has worked as a consultant with SharePoint911 since 2009. Prior to joining the SharePoint911 team, he worked for Boulder Valley School District, where he had his first introduction to SharePoint. He has since worked with many companies and organizations troubleshooting issues and helping them plan successful SharePoint deployments. In addition, Ryan helped author and edit material related to SharePoint 2010 for Microsoft. He was a contributing author on *Professional SharePoint 2010 Administration*, and a technical editor for *Professional SharePoint 2010 Branding*. Ryan lives in Firestone, Colorado with his wife Brittany, their two dogs, and a cat. He and his wife are expecting their first child in April 2011.

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# *Credits*

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**WELL, HERE IT IS**—another book! I thought things would be easier the second time around, but it was not to be. Although writer's block wasn't the same issue it was the first time around, my life itself has been a whole lot more complicated. The biggest thing, of course, was getting married. I met my lovely new wife, Brenda, after I had started working on the book. She has been absolutely marvelous in her support and encouragement, even though this project took away time that could (should?) have been for us. My deepest thanks must belong to her.

Of course, I can't forget to thank everyone else who made this possible: Asif Rehmani and Bryan Phillips, my cohorts from the first book, reprised their roles, now joined by first-timer Marcy Kellar; Our Wrox editorial team—Paul Reese, Christopher Rivera, and Jim Minatel—along with our technical editors, and everyone at Wrox and Wiley who make the production of a book like this flow smoothly.

Finally, I thank you, our readers. Without your interest in the subject, there wouldn't be a reason for the patience, encouragement, and hard work.

—Woody Windischman

**FIRST, I THANK GOD** for the opportunity to contribute to this book and all the other opportunities that have come my way. Writing a book is never an easy feat. It requires hard work and support from friends and family. I want to thank my very awesome wife, Anisa, for supporting me throughout this process and letting me skip out on things as needed so I could hit my deadlines. I'm also very thankful to my boys, Armaan and Ayaan, for the comic relief they provide every time I start stressing out about little things.

There is a lot of material in this book, and I'm thankful to my co-authors (Woody, Bryan, and Marcy) for joining forces to provide a thorough breakdown of all the awesome bells and whistles that ship with SharePoint Designer 2010. Also, thanks to Paul Reese and Jim Minatel at Wiley Publishing for giving us all the opportunity to write this book.

—Asif Rehmani

**THIS BOOK IS DEDICATED** to the memory of Larry Page, who lived every day as if it were his last and showed everyone that you are never too old to learn something new.

—Bryan Phillips

**I WOULD LIKE TO THANK** co-authors, Bryan Phillips and Woody Windischman, for pitching in and giving up so much of their time to help make sense of my writing. Woody, you are a saint. Bryan, you have a true gift for teaching. I was blessed to have you both on the team in the 11th hour. Thank you to Christopher Rivera, Project Editor, for always being positive and responsive. Your email replies and candid advice helped more than you know. Thanks to Lisa Atarian, talented SharePoint architect and friend. You dove right in without complaint to research SharePoint 2010 with me. Your subsequent empathy will not be forgotten. Thanks to Jeremy Thake and Mark Miller for working with me as my time on your project shrank so I could focus on the book. Thank you to David Shadle, my UX mentor at Microsoft. Your stories and advice inspired and influenced me right out of the nest. Thank you to the team at PointBridge for making it so easy to transition into the next chapter of my life. Finally, thank you to T. William. I can't overlook how often you were there for me with your technical genius and fascinating recollection of how to diagram a sentence. You are a brilliant man.

—Marcy Kellar

# ***Introduction***

Microsoft SharePoint is taking the world by storm. More and more, web designers are being blown along with it—whether they want to be or not. SharePoint is a large, complicated web application. There is a lot of conflicting, confusing (and sometimes just plain bad) advice floating around with regard to how to go about customizing SharePoint for a particular customer. *Beginning SharePoint Designer 2010* can be your eye of calm at the heart of this maelstrom.

## **Who This Book Is For**

Maybe you are an experienced web designer who has been asked to brand a SharePoint site. Perhaps you're a business analyst who needs a workflow to manage a QA process, or a power user of SharePoint who wants to mash-up data from a line of business systems (or several) into an online map. Or, maybe you're new to both SharePoint and web design, and just want to see what it's all about.

*Beginning SharePoint Designer 2010* offers something for all of you. Although it is not an HTML primer, it does contain some valuable pointers that someone new to web design can use. Yet, because SharePoint Designer is about far more than page editing, even if you never have (and probably never will) gaze upon raw HTML code, this book has plenty to offer you.

## **What This Book Covers**

This book provides a broad overview of Microsoft SharePoint Designer 2010. It covers everything from basic page editing to workflow design. You'll be taken from master pages to

Silverlight and points beyond. Even the companion technologies of Microsoft InfoPath and Visio find their way between these covers.

This book does far more than scratch the surface in many areas. You will find detailed information on integrating data from other sources into SharePoint, and some of the most comprehensive documentation on the internals of SharePoint's master pages and CSS anywhere.

Since you're reading a Wrox book, you would expect to find programming examples, and those are here as well. There are two chapters dedicated to using the SharePoint client-side object model to take your applications above and beyond. Beyond what? Well, that's going to depend on your own imagination!

## **How This Book Is Structured**

This book starts at the beginning, with an overview of the SharePoint Designer 2010 user interface elements that are common to most of its functions. Since many readers are going to be creating visual elements for SharePoint, the next several chapters deal with editing and styling pages (aka *branding*).

Following the chapters relating to “form” are chapters that deal with using SharePoint designer to introduce “function” into your sites. This function ranges from designing lists and libraries for storing data, to putting that data into action with workflows, custom forms, and Web Part connections.

Finally, there are two chapters dedicated to expanding the capabilities of SharePoint itself through programming.

You will also find three appendixes designed to give you the SharePoint background and reference material you need to understand and implement many of the concepts introduced throughout the rest of this book.

# What You Need to Use This Book

With such an array of material to cover, this book has to make some assumptions about both you as a reader, and the environment in which you work.

First, a bit about you. This book assumes you have a solid understanding of Windows and using Windows-based applications. That means you already know how to move your mouse around, click on items, drag to select text, and drag-and-drop to move things. Copying, cutting, and pasting should be second nature, and you should know the difference between a menu and a font—just to name a few.

Although you can use much of the book without any programming experience, Chapters 12 and 13 assume you know how to program in (or at least read) the JavaScript programming language. Chapter 2 assumes you know something about HTML markup. Although several of the chapters deal with XSLT-based web parts, most of these cover the use of visual design tools, and therefore, a deep understanding of XSL is not required.

Now, on to your environment. The biggest assumption made is that you have access to both a copy of Microsoft SharePoint Designer 2010, and at least some access to a site based on either: Microsoft SharePoint Server 2010, Microsoft SharePoint Foundation 2010, or Microsoft Search Server 2010. SharePoint Designer 2010, SharePoint Foundation 2010, and the Express edition of Search Server 2010 are available for download without charge.

Some exercises may require SharePoint Server 2010, as it has many features that are not built into SharePoint Foundation or Search Server. Others will also require Microsoft InfoPath 2010 or Microsoft Visio 2010. To use these products in production requires paid licenses; however, they are all available for free download in time-limited trial form.

Finally, Chapter 13 requires certain development tools:

- Microsoft Visual Studio 2010
- Silverlight 4 Tools for Visual Studio 2010
- Silverlight Toolkit
- Microsoft Expression Blend 4 (optional, but recommended)

All of these tools are also available for download either free, as part of an MSDN subscription, or as trial copies.

## Conventions

To help you get the most from the text and keep track of what's happening, we've used a number of conventions throughout the book.

### Try It Out

The *Try It Out* is an exercise you should work through, following the text in the book.

1. It usually consists of a set of steps.
2. Each step has a number.
3. Follow the steps through with your copy of the database.

### *How It Works*

After each *Try It Out*, the code you've typed will be explained in detail.



### Warning

Boxes with a warning icon like this one hold important, not-to-be-forgotten information that is directly relevant to the surrounding text.



## Note

The pencil icon indicates notes, tips, hints, tricks, or asides to the current discussion.

As for styles in the text:

- We *highlight* new terms and important words when we introduce them.
- We show keyboard strokes like this: Ctrl+A.
- We show file names, URLs, and code within the text like `SO: persistence.properties`.
- We present code in two different ways:

We use a monofont type with no highlighting for most code examples.

We use **bold** to emphasize code that is particularly important in the present context or to show changes from a previous code snippet.

## Source Code

As you work through the examples in this book, you may choose either to type in all the code manually, or to use the source code files that accompany the book. All the source code used in this book is available for download at [www.wrox.com](http://www.wrox.com). When at the site, simply locate the book's title (use the Search box or one of the title lists) and click the Download Code link on the book's detail page to obtain all the source code for the book. Code that is included on the Web site is highlighted by the following icon:



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## Errata

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4. You will receive an e-mail with information describing how to verify your account and complete the joining process.



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# ***Part I***

## ***The Lay of the Land***

**Chapter 1:** Exploring SharePoint Designer

# ***Chapter 1***

## ***Exploring SharePoint Designer***

### **What You Will Learn in This Chapter**

- How SharePoint Designer fits into Microsoft's toolset
- SharePoint Designer's basic features
- How to create a SharePoint site
- How to open an existing SharePoint site
- How a SharePoint site is represented in SharePoint Designer
- How to change site-wide SharePoint properties
- Restricting what SharePoint Designer users can do

## **What Is SharePoint Designer 2010?**

Microsoft SharePoint 2010 is a large and sophisticated web application. It should come as no surprise, therefore, that the tool meant to customize it—Microsoft SharePoint Designer 2010—is a large, sophisticated desktop application. Microsoft SharePoint Designer 2010 is the premier tool for customizing sites based on Microsoft SharePoint 2010. It provides features for:

- Creating and editing master pages and page layouts
- Creating and editing cascading style sheets (CSS)
- Designing and editing workflows
- Connecting SharePoint to various external data sources
- Creating and modifying lists, libraries, and views of data