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Beginning SharePoint® Designer 2010

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

BEGINNING SHAREPOINT® DESIGNER 2010

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BEGINNING

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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, has been based on SharePoint for almost its entire existence.

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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.

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—WOODY WINDISCHMAN

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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

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—MARCY KELLAR

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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

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