

Join the discussion @ p2p.wrox.com



Wrox Programmer to Programmer™



Beginning SharePoint® Designer 2010

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

BEGINNING SHAREPOINT® DESIGNER 2010

INTRODUCTIONxxv
► PART I THE LAY OF THE LAND	
CHAPTER 1	Exploring SharePoint Designer 3
► PART II LET’S GET VISUAL	
CHAPTER 2	Editing Pages 39
CHAPTER 3	The Anatomy of a SharePoint Page 73
CHAPTER 4	Publishing Pages 107
CHAPTER 5	Styles and Themes 137
► PART III DATA GALORE	
CHAPTER 6	Lists, Libraries, & Internal Content Types 195
CHAPTER 7	Data Sources and External Content Types 235
CHAPTER 8	XSLT Data Views and Forms 265
CHAPTER 9	InfoPath Integration 291
► PART IV TAKING ACTION	
CHAPTER 10	Web Part Connections 319
CHAPTER 11	Workflow Basics 349
CHAPTER 12	Advanced Workflows 381
CHAPTER 13	Client-side Programming in JavaScript 409
CHAPTER 14	Client-side Programming in Silverlight 455
APPENDIX A	A Brief History of SharePoint and SharePoint Designer 511
APPENDIX B	Just What Is SharePoint Anyway? 521
INDEX541

BEGINNING

SharePoint® Designer 2010

BEGINNING

SharePoint® Designer 2010

Woodrow Windischman

Bryan Phillips

Asif Rehmani

Marcy Kellar



Wiley Publishing, Inc.

Beginning Sharepoint® Designer 2010

Published by
Wiley Publishing, Inc.
10475 Crosspoint Boulevard
Indianapolis, IN 46256
www.wiley.com

Copyright © 2011 by Wiley Publishing, Inc., Indianapolis, Indiana

Published simultaneously in Canada

ISBN: 978-0-470-64316-7
ISBN: 978-1-118-01389-2 (ebk)
ISBN: 978-1-118-01390-8 (ebk)
ISBN: 978-1-118-01493-6 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

Limit of Liability/Disclaimer of Warranty: The publisher and the author make no representations or warranties with respect to the accuracy or completeness of the contents of this work and specifically disclaim all warranties, including without limitation warranties of fitness for a particular purpose. No warranty may be created or extended by sales or promotional materials. The advice and strategies contained herein may not be suitable for every situation. This work is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If professional assistance is required, the services of a competent professional person should be sought. Neither the publisher nor the author shall be liable for damages arising herefrom. The fact that an organization or Web site is referred to in this work as a citation and/or a potential source of further information does not mean that the author or the publisher endorses the information the organization or Web site may provide or recommendations it may make. Further, readers should be aware that Internet Web sites listed in this work may have changed or disappeared between when this work was written and when it is read.

For general information on our other products and services please contact our Customer Care Department within the United States at (877) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books.

Library of Congress Control Number: 2010932453

Trademarks: Wiley, the Wiley logo, Wrox, the Wrox logo, Programmer to Programmer, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates, in the United States and other countries, and may not be used without written permission. All other trademarks are the property of their respective owners. Wiley Publishing, Inc., is not associated with any product or vendor mentioned in this book.

*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.

BRYAN PHILLIPS is a senior partner at Composable Systems, LLC (www.composablesystems.net) and a Microsoft Most Valuable Professional in SharePoint Services. He is a co-author of Professional Microsoft Office SharePoint Designer 2007 and maintains a SharePoint-related blog at <http://bphillips76.spaces.live.com>. Bryan has worked with Microsoft technologies since 1997 and holds the Microsoft Certified Trainer (MCT), Microsoft Certified Solution Developer (MCSD), Microsoft Certified Database Administrator (MCDBA), and Microsoft Certified Systems Engineer (MCSE) certifications.

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), 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). 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).

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. 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.

SUNDAR NARASIMAN works as Technical Architect with Microsoft Solutions Center of Excellence at Cognizant Technology Solutions, Chennai. He has been a Microsoft Most Valuable Professional in SharePoint since 2008. He has more than 10 years of industry experience. He is primarily into the Architecture & Technology Consulting on Microsoft space. He has passion for programming and is excited about SharePoint 2010. He blogs at http://msmvps.com/blogs/sundar_narasiman/ and can be reached at sundar.architect@gmail.com.

CREDITS

Acquisitions Editor

Paul Reese

Project Editor

Christopher J. Rivera

Technical Editors

Reza Alirezaei

Coskun Cavusoglu

Ryan Keller

Sundar Narasiman

Production Editor

Daniel Scribner

Copy Editor

Paula Lowell

Editorial Director

Robyn B. Siesky

Editorial Manager

Mary Beth Wakefield

Associate Director of Marketing

David Mayhew

Production Manager

Tim Tate

**Vice President and Executive Group
Publisher**

Richard Swadley

Vice President and Executive Publisher

Barry Pruett

Associate Publisher

Jim Minatel

Project Coordinator, Cover

Lynsey Stanford

Proofreader

Word One

Indexer

Robert Swanson

Cover Designer

Michael E. Trent

Cover Image

© Lisa Davis/istockphoto

ACKNOWLEDGMENTS

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

CONTENTS

INTRODUCTION

xxv

PART I: THE LAY OF THE LAND

CHAPTER 1: EXPLORING SHAREPOINT DESIGNER	3
What Is SharePoint Designer 2010?	3
All in the Family	4
A Backstage Pass	4
Backstage Sections	6
The Sites Section	7
The Pages Section	8
The Add Item Section	9
The Help Section	9
SharePoint Designer Application Options	10
The General Page	11
The Language Page	12
The Customize Ribbon Page	13
The Quick Access Toolbar Page	15
The Add-Ins Page	16
The Trust Center Page	16
Digging for Artifacts	18
The Site Summary Page	19
Site Ribbon Tab	20
Site Summary Page Blocks	25
Other Site Object Views	27
Lists and Libraries	27
Workflows	28
Site Pages	28
Site Assets	28
Content Types	29
Site Columns	29
External Content Types	30
Data Sources	30
Master Pages, and Page Layouts	31
Site Groups	32
Subsites	33

All Files	33
Governing SharePoint Designer	34
Summary	36

PART II: LET'S GET VISUAL

CHAPTER 2: EDITING PAGES **39**

What's in a "Page"?	39
Design View	42
Visual Aids and Page Sizes	43
Safe and Advanced Editing Modes	45
Code View	46
IntelliSense	47
Code Snippets	48
Visual Coding	50
Split View	52
Using Task Panes and Ribbon Tabs to Get Work Done	53
Managing Task Panes	53
Task Pane Function Overview	55
Properties Panes	55
CSS Management Panes	55
Internal Insertable Elements Panes	59
Reporting Panes	61
External Insertable Elements Panes	65
Ribbon Tabs and Their Functions	65
Tables	67
Pictures	67
Links	69
Controls	70
Web Parts	71
Symbols	72
Summary	72

CHAPTER 3: THE ANATOMY OF A SHAREPOINT PAGE **73**

How SharePoint Pages Work	73
Page Types	75
SharePoint Content Pages	76
Web Part Pages	76
Wiki Pages	77
View Pages	78

A Note about Page Customization	79
Master Pages	80
Master Page Locations	81
Default Master Pages	81
v4.master	82
default.master	82
minimal.master	83
simple.master	84
MWSDefaultv4.master	85
nightandday.master	85
Other Master Pages	86
Modifying the Default Master Page	86
Applying a New Master Page	89
Creating Custom Master Pages	89
Required Placeholders	90
Unused Placeholders	92
Required Controls	93
Broken Master Pages	93
Example Scenarios	94
Scenario 1: Fixed Width Layout	94
Scenario 2: Changing the Location of the Search Box	98
Scenario 3: Registering External CSS	100
Summary	105
CHAPTER 4: PUBLISHING PAGES	107
Web Content Management Overview	107
Creating a Web Content Management Strategy	108
Who Owns The Content?	108
Who Will Review And Approve The Content?	108
Does Content Already Exist?	109
Do You Want To Apply The Company Brand To The Site?	109
Getting Started with Publishing	109
Mixing Publishing and Collaboration Features	110
A Question Of Understanding	114
Publishing Pages	114
Publishing Master Pages	116
The Master Page Gallery	117
Editing the Example Publishing Master Page	118
Creating Custom Master Pages	121
Importing a Starter Master Page	122
Page Layouts	123

Foreshadowing Content Types	123
Page Layouts for Micro-design	125
Putting it All Together	125
Solution and Design	126
Creating Custom Site Columns	127
Creating a Custom Page Layout	128
Field Controls	129
Summary	134

CHAPTER 5: STYLES AND THEMES **137**

Style Defined	137
The Anatomy of CSS Rule Sets	138
Applying CSS to Your HTML	143
Inheritance and Priority	147
CSS Best Practices	150
SharePoint Designer's CSS Tools	151
View and Style Tabs	153
Task Panes	158
Styling Your Site	173
Key UI Elements in SharePoint	174
Themes	182
Other Things to Consider	190
Summary	192

PART III: DATA GALORE

CHAPTER 6: LISTS, LIBRARIES, & INTERNAL CONTENT TYPES **195**

Sharing Your Documents and Data	195
Built-In Lists and Libraries	196
Customizing Lists and Libraries	200
Adding Fields	201
Is It Data or Metadata?	205
Normal versus Promoted Fields	205
Changing Permissions	205
Versioning	207
Reusing Your Lists and Libraries	211
Sorting, Filtering, and Grouping	214
Creating Views	214
Sorting and Filtering	216

Grouping and Aggregations	220
Additional Settings	223
Structuring Your Data with Content Types	224
Making Structure and Order Portable	225
Hiding and Requiring Fields	231
Summary	234
CHAPTER 7: DATA SOURCES AND EXTERNAL CONTENT TYPES	235
Getting at Your Data	235
Lists and Libraries	238
Databases	238
XML Files	242
REST-Based Web Services	243
HTTP Method	243
Data Command	244
Parameters	244
SOAP-Based Web Services	246
Service Description Location	246
Data Command	247
Port	247
Operation	247
Parameters	247
Business Connectivity Services	249
Joining Your Disparate Data	260
Summary	263
CHAPTER 8: XSLT DATA VIEWS AND FORMS	265
Two Types of Web Parts to Work with Data	265
XSLT List View Web Part	266
A Little Bit of History	266
What's New in SharePoint 2010	267
XSLT Data Form Web Part	268
Managing Views of Data	271
Custom Views of Lists and Libraries	271
Custom Views to External Sources of Data	278
Creating Custom Forms	284
Creating Data Forms	284
Creating List Forms	286
Using Custom Actions to Execute List Forms	289
Summary	290

CHAPTER 9: INFOPATH INTEGRATION	291
The Path to Gathering Info	291
Using Rules for Conditional Formatting and Data Validation	294
Fetching Data from Multiple Repositories	297
Publishing Forms to a Variety of Locations	297
Customizing SharePoint List Forms	300
Building List Forms Using InfoPath	300
Displaying Forms Using InfoPath Form Web Part	306
Customizing SharePoint Library Forms	307
Creating the InfoPath Form Template	308
Publishing to the Form Library	313
Summary	316

PART IV: TAKING ACTION

CHAPTER 10: WEB PART CONNECTIONS	319
Types of Web Parts	319
Web Part Gallery	319
Configuring and Arranging Web Parts	322
Personalization	329
Exporting Web Part Configurations	332
Creating a Composite User Interface	337
Web Part Connections	338
Example Scenarios	347
Dashboards	347
Task-centric Workspaces	348
Summary	348
CHAPTER 11: WORKFLOW BASICS	349
Ways to Create Workflows in SharePoint	349
Built-in Workflow Templates	350
SharePoint Designer 2010 Workflows	351
Visual Studio Workflows	354
SharePoint Designer 2010 Workflow Elements	354
Workflow General Settings	354
Workflow Information	354
Customization	354
Settings	354
Workflow Start Options	355
Forms	356
Initiation Parameters	356

Initiation Form	357
Association Columns	358
Variables	358
Steps	358
Impersonation Steps	359
Conditions	359
Actions	360
Core Actions	361
List Actions	362
Task Actions	364
Utility Actions	365
Relational Actions	366
Document Set Actions	366
Parallel Block	366
Advanced Properties	367
Saving and Publishing the Workflow	368
Automating Processes Using SharePoint Designer 2010 Workflows	368
List Workflows	368
Reusable Workflows	371
Site Workflows	375
SharePoint Designer 2010 Workflow Considerations	378
Limitations	378
Ramifications and Cautions	378
Summary	379
CHAPTER 12: ADVANCED WORKFLOWS	381
Modeling Workflows Using Visio 2010	381
Exploring the Visio 2010 SharePoint Workflow Stencils	382
Building the Visio Workflow	383
Working with Visio 2010 Workflows in SharePoint Designer 2010	385
Importing Workflows in SharePoint Designer 2010	385
Configuring and Publishing the Workflow	386
Visualizing a Workflow Using Visio Visualization	389
Exporting the Workflow	392
Customizing Workflow Forms with InfoPath 2010	392
Built-In Global Workflows	395
Creating New Globally Reusable Workflows	396
Using the Task Process Designer	399
Exporting Workflows as a Package	403
Deploying a Workflow Package to a Site Collection	404
Importing a Workflow Package in Visual Studio	406
Summary	407

CHAPTER 13: CLIENT-SIDE PROGRAMMING IN JAVASCRIPT	409
The Client Object Model	409
Getting Started	410
Retrieving Data Using CAML	420
Querying Document Libraries	429
Managing List Items	434
Managing User Custom Actions	443
Summary	454
CHAPTER 14: CLIENT-SIDE PROGRAMMING IN SILVERLIGHT	455
Why Silverlight?	455
Getting Started	456
Creating a New Silverlight Application	456
Adding a Silverlight Web Part to a Web Page	460
Debugging a Silverlight Project	462
Retrieving Data Using Silverlight	463
Managing Lists and Libraries	470
Managing Files and Folders	483
Managing Navigation	495
Limitations	509
Summary	510
APPENDIX A: A BRIEF HISTORY OF SHAREPOINT AND SHAREPOINT DESIGNER	511
From FrontPage to SharePoint Designer	511
The SharePoint Family Tree	513
The Years BSP (Before SharePoint)	513
Fraternal Twins — It's All in the Name	515
SharePoint Team Services (1.0)	515
SharePoint Portal Server 2001	515
Let's Get Together — Casting the (dot) Net	517
Windows SharePoint Services — A Platform Is Born	517
Opening a New Portal	517
Gathering MOSS — Windows SharePoint Services 3.0 and Microsoft Office SharePoint Server 2007	518
Continuing Evolution — SharePoint Foundation 2010 and SharePoint Server 2010	520

APPENDIX B: JUST WHAT IS SHAREPOINT ANYWAY?	521
A Default SharePoint Home Page	521
SharePoint Content: Lists, Libraries, and More	523
List and Library Types	523
Customizing Lists and Libraries	524
Columns (Fields)	525
Content Types	526
Understanding Views	526
Web Parts	526
In the Zone	527
Making the Connection	529
Managing a SharePoint Site	529
Users and Permissions	530
Managing Users	530
Managing Groups	532
Look and Feel — Navigational Elements and More	533
Using Galleries	535
Architectural Background On the Server	535
Central Administration	536
The File Structure	538
The SharePoint Databases	538
The Configuration Database	539
The Content Databases	539
INDEX	541

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. 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:



Listings include the filename in the title. If it is just a code snippet, you'll find the filename in a code note such as this:

Code snippet filename



NOTE Because many books have similar titles, you may find it easiest to search by ISBN; this book's ISBN is 978-0-470-64316-7.

Once you download the code, just decompress it with your favorite compression tool. Alternately, you can go to the main Wrox code download page at www.wrox.com/dynamic/books/download.aspx to see the code available for this book and all other Wrox books.

ERRATA

We make every effort to ensure that there are no errors in the text or in the code. However, no one is perfect, and mistakes do occur. If you find an error in one of our books, like a spelling mistake or faulty piece of code, we would be very grateful for your feedback. By sending in errata, you may save another reader hours of frustration, and at the same time, you will be helping us provide even higher-quality information.

To find the errata page for this book, go to www.wrox.com and locate the title using the Search box or one of the title lists. Then, on the book details page, click the Book Errata link. On this page, you can view all errata that have been submitted for this book and posted by Wrox editors. A complete book list, including links to each book's errata, is also available at www.wrox.com/misc-pages/booklist.shtml.

If you don't spot "your" error on the Book Errata page, go to www.wrox.com/contact/techsupport.shtml and complete the form there to send us the error you have found. We'll