

# Making the Best use of SharePoint Designer 2010

Presented by:

**Asif Rehmani, SharePoint Server MVP  
Trainer/Solution Architect  
[asif@sharepointelearning.com](mailto:asif@sharepointelearning.com)**

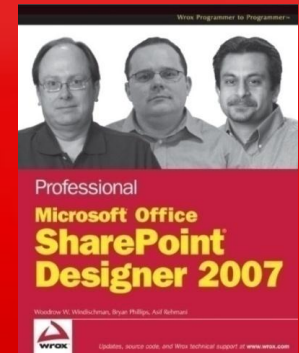
# Who am I?

asif@sharepointelearning.com

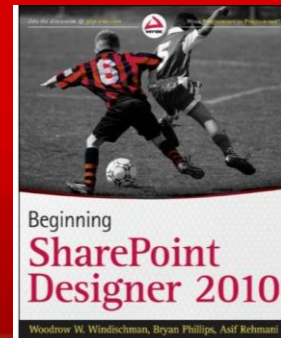


Current Video Count: 202

- ▶ Microsoft Office SharePoint Server MVP, MCT
- ▶ Principal contributor at **SharePoint-Videos.com**
  - Videos on SharePoint, SharePoint Designer and InfoPath
- ▶ SharePoint 2010 Training



- ▶ Co-Author of the book Professional SharePoint Designer 2007 and the upcoming book Beginning SharePoint Designer 2010



- ▶ Speaker at various conferences
  - Microsoft TechEd, SharePoint Conference, SharePoint Connections, Best Practices Conference etc.

# Information flow of the points in the presentation



# Building Solutions and Customizing SharePoint

- End Users
- Designers
- Site Admins
- IT Professionals



- Designers
- Site Admins
- Developers
- IT Professionals

Microsoft®  
**SharePoint® Designer 2010**

Microsoft®  
**Visual Studio®**

- Developers

# Introducing SharePoint Designer in your Organization

- ▶ Know that anyone can download directly from Microsoft's website
- ▶ Best to inform user base to wait until they get a "clearance" from IT before downloading & installing

# SharePoint Designer usage Permission Levels

Web Application Administrators manage permissions for Site Collection Administrators

The screenshot shows the 'SharePoint Designer Settings' dialog box. The 'Web Application' is set to 'http://win-adjg17oy570/'. The 'Allow SharePoint Designer to be used in this Web Application' checkbox is checked. The 'Allow SharePoint Designer to be used in this Site Collection' checkbox is also checked. Other options include 'Allow Site Admins to Detach Pages from the Site Template', 'Allow Site Admins to Customize Master Pages and Layout Pages', and 'Allow Site Admins to see the URL structure of their Web Site', all of which are unchecked.

Setting	Value
Web Application	http://win-adjg17oy570/
Allow SharePoint Designer to be used in this Web Application	<input checked="" type="checkbox"/> Enable SharePoint Designer
Allow SharePoint Designer to be used in this Site Collection	<input checked="" type="checkbox"/> Enable SharePoint Designer
Allow Site Admins to Detach Pages from the Site Template	<input type="checkbox"/> Enable Detaching Pages from the Site Definition
Allow Site Admins to Customize Master Pages and Layout Pages	<input type="checkbox"/> Enable Customizing Master Pages and Layout Pages
Allow Site Admins to see the URL structure of their Web Site	<input type="checkbox"/> Enable Managing of the Web Site URL Structure

Site Collection Administrators manage permissions for Site Administrators and Designers

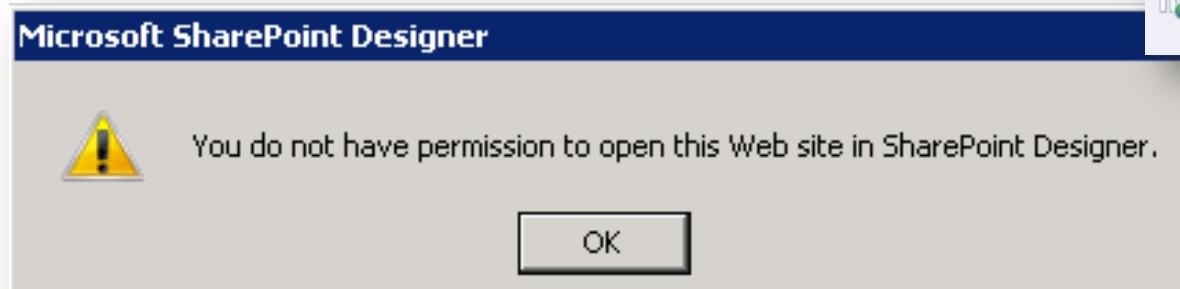
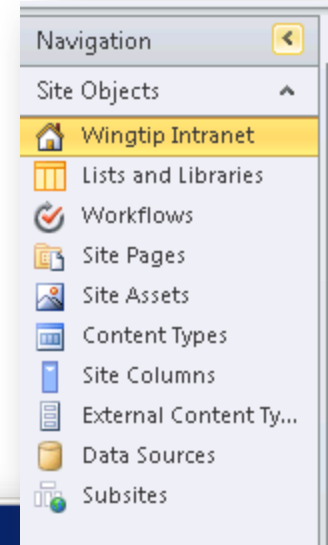
# Default SPD functionality available for Site Users

Best Practice:  
Think hard before  
Changing these

## ▶ Site Administrators and Designers

- No access to Master Pages
- No access to manage website hierarchy

## ▶ Readers and Members



# Demo

# Switching Master Pages

## Best done easily through SPD

v4.master

- Team site Master Page
- User content pages (lists\content pages\etc)
- \_layouts pages (site settings, etc)

minimal.master

- For app experiences, like Search or Office Web Applications
- If you do not need site navigation
- If you do not have a ribbon
- If your app needs the space

default.master

- Show site using legacy interface
- No Ribbon, no fluency

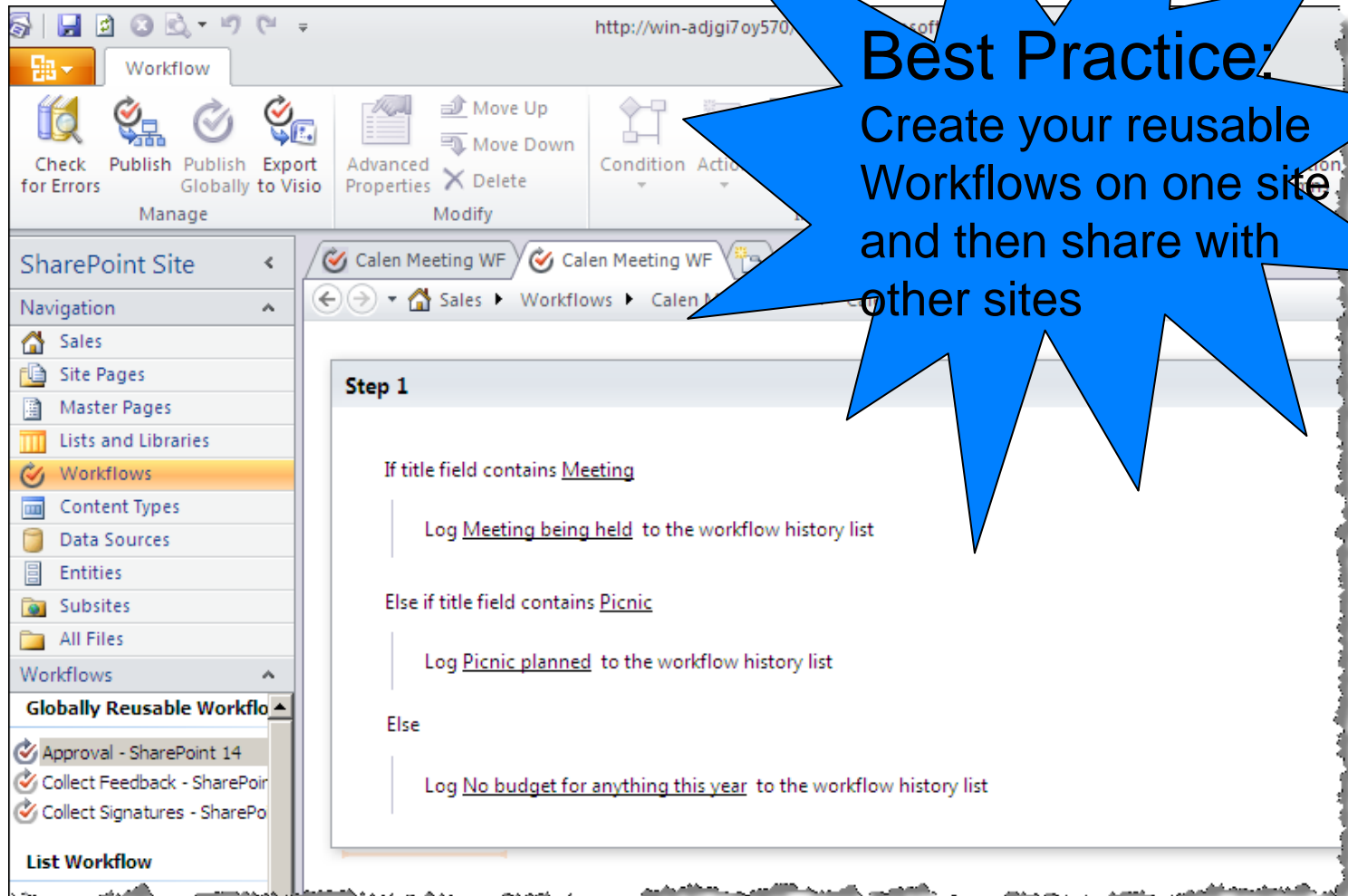
# Demo

# Workflow Tools

- ▶ SharePoint 2010 offers new development process
  - Envision workflows in Visio
  - Import into SharePoint Designer
    - Parameterize
  - Export to Visual Studio 2010
    - Add code



# Reusable and Package-able Workflows



The screenshot displays the SharePoint workflow editor interface. The top navigation bar includes a 'Workflow' tab and a ribbon with actions such as 'Check for Errors', 'Publish', 'Publish Globally to Visio', 'Export to Visio', 'Advanced Properties', 'Delete', 'Move Up', 'Move Down', 'Condition', and 'Action'. The left sidebar shows the 'SharePoint Site' navigation pane with 'Workflows' selected. The main content area shows a workflow step configuration for 'Step 1' with the following conditions and actions:

- If title field contains Meeting
  - Log Meeting being held to the workflow history list
- Else if title field contains Picnic
  - Log Picnic planned to the workflow history list
- Else
  - Log No budget for anything this year to the workflow history list

**Best Practice:**  
Create your reusable Workflows on one site and then share with other sites

# Demo

# XSLT Web Parts

- ▶ Accessing SharePoint and non-SharePoint data

The screenshot shows a SharePoint form editor for 'EditEmployeeInfo.aspx'. The form contains several data fields: 'Login ID' (value: adventure-works\quy1), 'Employee ID' (value: 1,234.56), 'Contact ID' (value: 1,234.56), and 'Manager ID' (value: ManagerID field value.). A context menu is open over the 'Employee ID' field, showing options for 'Data Field' (EmployeeID) and 'Format as' (List Form Field). The 'Format as' menu is open, showing options: Text, Rich Text, Number, Currency, Label, and List Form Field. The 'List Form Field' option is selected. The status bar at the bottom shows the XSLT code: <tr> <td> <table> <tr> <td.ms-formbody> <SharePoint:FormField#ff21>

**Best Practice:**  
When accessing external data, only retrieve what you need to avoid clogging the bandwidth.

# Conditional Formatting

The image shows a SharePoint ribbon with the 'Options' tab selected. The 'Conditional Formatting' button is highlighted, and its dropdown menu is open, showing options: Show Content, Hide Content, Format Row, Format Column, and Format Selection. The 'Format Selection' option is selected. Below the ribbon, two dialog boxes are shown. The 'Modify Style' dialog box is in the foreground, showing the 'Font' category selected. The 'font-weight' is set to 'bold' and the 'color' is set to '#FF0000'. The preview shows the text 'AaBbYyGgLLJj' in bold red. The 'Condition Criteria' dialog box is in the background, showing a table with one row: 'VacationHours' compared 'Less Than' the value '10'. The 'And/Or' column is set to 'And'. The 'Set Style' button is highlighted in the 'Modify Style' dialog.

File Home Insert View Options Design Web Part Ta

Filter Sort & Group Conditional Formatting Finder Parameters Formula Paging Add/Remove Columns Fields

- Show Content
- Hide Content
- Format Row
- Format Column
- Format Selection

Navigation Site Objects Human Res Lists and Li Workflows

Employee Info... \* Home Human

Condition Criteria

Specify criteria to determine when conditional formatting will be applied.

Field Name	Comparison	Value	And/Or
VacationHours	Less Than	10	And

Click here to add a new clause...

Group Ungroup Advanced...

Set Style Cancel

Modify Style

Category: Font

font-family: [dropdown]  
font-size: [dropdown] px  
font-weight: bold  
font-style: [dropdown]  
font-variant: [dropdown]  
text-transform: [dropdown]  
color: #FF0000

text-decoration:  
 underline  
 overline  
 line-through  
 blink  
 none

Preview: AaBbYyGgLLJj

Description: font-weight: bold; color: #FF0000

OK Cancel

# Demo

# What can you not make in SharePoint Designer 2010?

- ▶ Site Collections
- ▶ Wiki Pages
- ▶ Some Publishing Site specific columns

# Call to Action

- Watch the free videos on <http://www.sharepoint-videos.com>
- Connect with me –  
Let us know if we can help with your  
Training or Consulting needs  
[asif@sharepointelearning.com](mailto:asif@sharepointelearning.com)  
twitter: asifrehmani

Please be sure to fill out your  
session evaluation!