



## Developer's Guide to SharePoint Designer 2007

*Five days; Instructor Led*

### Overview

This 5-day course is designed to give students the tools and knowledge to customize SharePoint sites without writing code by using SharePoint Designer 2007 and in-browser customizations. The course addresses aspects of design such as applying alternate page layouts, creating and styling new pages, modifying site navigation, and external data integration and custom workflows. After taking this course students will understand the difference between using SharePoint Designer 2007 and in-browser tools including what is achievable with each tool, and how and when to use those tools to effect SharePoint site customization. The course also factors in Web site design concepts that focus on creating user-centric SharePoint sites.

### Prerequisites

Prior to taking this course, students should have a general knowledge of Web site design and methodologies. Students should have an "administrative understanding" of Windows SharePoint Services 3.0 (WSS) and Microsoft Office SharePoint Server 2007 (MOSS) – (i.e. have completed Microsoft course 5060/5061). Students should have also completed Microsoft SharePoint Designer 2007 Level 1. An understanding of ASP.NET 2.0 master pages and cascading style sheets is helpful, but not required.

### Intended Audience

The primary audiences for this course are Web designers, administrators, and developers that use and work with Office SharePoint Server 2007, and want to learn how to customize SharePoint sites without writing code. Individuals in these job categories will benefit from this course as follows:

- **Web designers** will understand the extent of customizations available using in-browser tools. They will also learn the advantages of using SharePoint Designer 2007 to further enhance SharePoint site customization such as changing master pages and creating multiple-step workflows.



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- **Administrators** will learn how SharePoint Designer 2007 can help with administrative tasks such as backing up and restoring sites to alternate locations, and setting design level permissions for end users who work with SharePoint Designer 2007. Administrators will also understand the in-browser customization capabilities made available to end users depending on the permission settings for those users.
- **Developers** will understand the alternatives to working with Visual Studio 2005. They will also learn which customizations are achievable using in-browser tools and SharePoint Designer 2007. In addition, developers will learn how to create custom solutions using SharePoint Designer 2007. For example, the course explores:
  - Data integration using Web services
  - Using conditional formatting and XSLT to format data
  - Adding ASP.NET and SharePoint controls
  - Developing multiple-step workflows

**Note:** Throughout this course we refer to code-free customizations. By **code-free**, we mean no complex programming languages such as .NET languages or code compilation. However, to help demonstrate the extensibility of functions within SharePoint Designer 2007, we do not exclude use of Cascading Style Sheet (CSS) scripting/class, Extensible Stylesheet Language (XSLT), Extensible Markup Language (XML), XML Path Language (XPath), or existing page code. For example, when discussing master pages, we use SharePoint Designer 2007 to show the code view for how master pages are associated with existing SharePoint site pages.

## Outline

### Module 0: Course Overview and Web Design Concepts

This module provides an overview of the course modules. It also includes Web site design and Web site design best practices to use when planning SharePoint site design and customization.

### Module 1: In-Browser Customizations



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Before learning how to extend code-free customizations using SharePoint Designer 2007, this module covers the types of customizations you can do using the in-browser tools. Module 1 covers the following topics:

- SharePoint publishing features
- Document libraries and Web Parts
- Create new pages and add content
- Apply different master pages and CSS to sites
- SharePoint themes
- Change the navigation
- Office authoring customizations
- Create workflows via the browser

## **Module 2: Introduction to SharePoint Designer 2007**

This module introduces SharePoint Designer 2007 and covers ways it can be used to enhance your SharePoint sites. Module 2 covers the following topics:

- Overview of SharePoint Designer
- How SharePoint Designer can enhance your SharePoint sites
- Create workflows using SharePoint Designer 2007

## **Module 3: SharePoint Designer 2007 Environment**

This module discusses the components that makeup the SharePoint Designer environment and what they mean in terms of customizing your SharePoint sites. To realize the available features, you will open an existing SharePoint site in SharePoint Designer. Module 3 covers the following topics:

- Connect to an existing SharePoint site
- Navigate within SharePoint Designer
- Working with views
- SharePoint site folders
- Create new pages and content
- Editing features
- Differentiation between editing publishing and non-publishing sites



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## **Module 4: Administrate SharePoint Sites with SharePoint Designer 2007**

In this module you learn how to leverage administrative features in SharePoint Designer to remotely administrate your SharePoint sites. Coverage includes establishing security settings that determine the degree by which users will be able to customize SharePoint sites. Module 4 covers the following topics:

- Configure contributor settings
- Check site's status with reports including usage analysis
- Migrate SharePoint sites including back up and restore

## **Module 5: Create SharePoint Sites with SharePoint Designer 2007**

In this module you create a new SharePoint site from within SharePoint Designer 2007 and then publish the site to an existing site collection. This module also explains how to leverage existing templates for the new site and then configure the new site using the SharePoint Designer 2007 tools including adding Web parts and SharePoint content. Module 5 covers the following topics:

- Create a new site and publish the site to the existing site collection
- Add new SharePoint content to the site including Web Parts, forms, and tables
- Custom behaviors
- Web components
- Index the new site in SharePoint and add it to the SharePoint site directory

## **Module 6: Create and Configure Data Sources**

This module explains how to use data sources to SharePoint libraries and lists throughout your site collection, databases, XML files, server-side scripts, Web services, and Business Data Catalogs. You will learn how to import data into your SharePoint site from each of these connections using the Data Source properties in SharePoint Designer 2007. This module also shows how to connect with and configure data sources. Module 6 covers the following topics:

- Overview of each data source



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- Connect with external databases
- Connect to another SharePoint library within your site collection
- Link data sources

## **Module 7: Data Views and Conditional Formatting**

This module explains how to use data views and data forms to present and configure data sources. You will work with data sources to add data to SharePoint pages and manipulate the data display using custom queries and conditional formatting. This module also explains how to write data back to the data source using Data Form Web Parts. Module 7 covers the following topics:

- Create a data view
- Import fields
- Conditional formatting
- Edit XPath expressions
- Apply filtering and style
- Edit, delete, and insert commands

## **Module 8: ASP.NET Controls**

In this module you learn how to configure ASP.NET controls within SharePoint sites. You also bind and populate those controls using data connections. Module 8 covers the following topics:

- Understand the overall role of controls in SharePoint Server 2007
- Review types of controls available
- Populate and format data using ASP.NET controls
- SharePoint controls

## **Module 9: Create and Modify Master Pages**

This module covers master pages that are based on the ASP.NET 2.0 framework. These master pages are an integral part of the SharePoint Server 2007 and Windows SharePoint Services v3 platforms. Master pages determine the appearance of pages and content throughout SharePoint sites. Module 9 covers the following topics:

- Working with the out-of-the-box master pages
- Create new master pages using SharePoint Designer 2007



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- Add and configure menu controls on master pages
- Manage master pages
- Apply CSS to master pages

## **Module 10: Content Pages**

In this module you learn about the relevance of content pages, which are known as page layouts in SharePoint Server 2007. This module covers how page layouts and master pages work hand-in-hand to determine the final composition of SharePoint pages. Module 10 covers the following topics:

- Understand the role of page layouts in SharePoint Server 2007
- Work with out-of-the-box page layouts
- Learn all about the inner workings of page layouts
- Build new page layouts using SharePoint Designer 2007

## **Module 11: Cascading Style Sheets**

This module explains how you can apply a custom style sheet to either a single site or an entire SharePoint site collection. You also learn about the SharePoint cascading style sheet (CSS) files including how to modify the out-of-the-box CSS, create new CSS files, and the best practices for managing SharePoint CSS files. Module 11 covers the following topics:

- Review the out-of-the-box CSS files and classes
- Modify out-of-the-box CSS files
- Create new CSS files and manage the CSS lifecycle

## **Module 12: Save Sites as Templates**

This module shows you how to save a customized site as a template, both using the in-browser and SharePoint Designer 2007 tools, and then explains how to use the template to create new sites in SharePoint. Module 12 covers the following topics:

- Differences between templates and site definitions in SharePoint
- Export or save customized site as a SharePoint site template
- Create a new site in SharePoint based on a custom template

## **Module 13: In-Browser Workflows**



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In this module you learn how to effectively work with the default workflows using the browser. It also explains how to create workflows for document libraries and lists throughout your SharePoint sites. Module e13 covers the following topics:

- How workflows can benefit your existing business processes
- Review the SharePoint default workflows
- Create an Approval workflow
- Create and deploy content type workflows
- Administrate workflows

### **Module 14: Create Workflows with SharePoint Designer 2007**

This module explains how to take workflows within SharePoint sites to the next level using SharePoint Designer 2007. In this module you work with a number of scenario-based workflow solutions including multi-step workflows and multi-conditional workflows. Module 14 covers the following topics:

- Relationship between SharePoint Designer 2007 workflows and Windows Workflow Foundation
- Use the SharePoint Designer 2007 Workflow Designer Wizard to create custom workflows
- Location and composition of workflow files
- Deploy workflows created in SharePoint Designer 2007 to SharePoint document libraries and lists Save and execute your workflow
- Run the workflow and review workflow status in your SharePoint site
- Review workflow logs on the SharePoint server.
- Work through a series of workflow scenario-based labs that include detailed instructions.