

Mindsharp Summit for Developers, Administrators and Web Designers

Customize Windows SharePoint Sites Without Writing Code Using Microsoft Office SharePoint Designer 2007

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 and modifying site navigation, as well as external data integration and custom workflows. Students will understand the difference between using SharePoint Designer 2007 and in-browser tools-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 which focus on creating user-centric SharePoint sites.

Student Pre-Requisites

This course is designed for students who are using and working with Office SharePoint Server 2007, and want to customize SharePoint sites without the need to write code:

- Web designers will understand the extent of customizations available using in-browser tools and the advantages of using SharePoint Designer 2007 to further enhance SharePoint site customization, such as changing master pages and styles, and creating multiple step workflows;
- 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 will work with SharePoint Designer 2007. Administrators will also understand the in-browser customization capabilities made available to end users, depending on the permission setting of those users.
- Developers will benefit by attending the course and understanding the alternatives to working with Visual Studio 2005-the customizations that are achievable via in-



browser tools and by using SharePoint Designer 2007. Developers will learn how they can develop custom solutions using SharePoint Designer 2007, such as data integration using web services, using conditional formatting and XSLT to format data, adding ASP.NET and SharePoint controls and develop 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. But, to help demonstrate the extensibility of functions within SharePoint Designer 2007, we don't 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, in discussing master pages, we'll show you in the SharePoint Designer 2007 code view how master pages are associated with existing SharePoint site pages.

Module 0: Introduction

The introduction provides an overview of the course modules. It also includes Web site design and factors in Web site design best practices when planning SharePoint site design and customization. Workflows are conceptualized in this module so that students will have a clearer understanding of application of SharePoint-specific workflows using SharePoint Designer 2007 and in-browser workflows.

Module 1: In-browser Customizations

In this module, you'll learn about the types of customizations you can do using the in-browser tools, ahead of learning how to extend code-free customizations using SharePoint Designer 2007.

- Working with SharePoint publishing features
 - Editing in place pages
 - Adding and positioning web parts
 - Approving and publishing pages
 - Document conversions
- Working with document libraries and web parts
- Creating new pages and adding content
- Applying different master pages and CSS to sites
 - Working with page layouts
- Working with SharePoint themes
- Changing the navigation
 - Appearance
 - Structure
 - Management



- Office authoring customizations
- Creating Workflows via the browser
 - Viewing Site collection workflow status
 - Understanding the types of workflows you can create via the browser
 - Approval
 - Collect Feedback
 - Collect Signatures
 - Disposition Approval
 - Three-state

Module 2: Introduction to SharePoint Designer 2007

In this module, you will be introduced to SharePoint Designer 2007 and understand ways in which you can use it to enhance your SharePoint sites. You will learn:

- Overview of SharePoint Designer
 - Typical scenarios for use
- How SharePoint Designer can enhance your SharePoint sites
 - Functionality
 - Look and feel
- Creating Workflows Using SharePoint Designer 2007
 - Windows Workflow Foundation
 - Comparison to Workflows created via:
 - In-browser
 - Visual Studio 2005

Module 3: Understanding the SharePoint Designer 2007 Environment

In this module, you will learn about the components that make up the SharePoint Designer environment and what they mean in terms of customizing your SharePoint sites. To realize the features available, you'll open an existing SharePoint site in SharePoint Designer:

- Connecting to an existing SharePoint Site
- Navigating within SharePoint Designer
 - Working with the menus and task panes
- Working with views
 - Coding options
- Exploring the SharePoint site folders in the Folder task pane
- Creating new pages and content
- Editing features
 - Safety net features
- Differentiation between editing publishing and non-publishing sites



Module 4: Administrating SharePoint Sites with SharePoint Designer 2007

In this module, you will learn about how you can leverage administrative features in SharePoint Designer to remotely administrate your SharePoint sites, including establishing the security settings which will determine the degree by which users will be able to customize SharePoint sites.

- Configuring Contributor Settings
 - Contributor groups
 - Region types
- Checking your site's status with Reports, including usage analysis
- Migrating SharePoint sites
 - Backing up a site
 - Restoring a site
 - Options for moving and copying sites and content

Module 5: Creating SharePoint Sites with SharePoint Designer 2007

In this module, you'll create a new SharePoint site from within SharePoint Designer 2007 and then publish the site to an existing site collection. You'll understand how you can leverage the 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.

- Create a new site and publish the site to the existing site collection
- Add new SharePoint content to the site
 - Add new web parts to the site
 - Modifying web part zones
 - Working with Forms pages
 - Creating and adding new pages
 - Working with tables
 - Adding images
- Custom behaviors
- Working with web components
- Indexing the new site in SharePoint and adding the new site to the SharePoint site directory

Module 6: Creating and Configuring Data Sources in SharePoint Designer 2007

Using data sources, you can connect to SharePoint libraries and lists throughout your site collection, databases, XML files, server-side scripts, web services and Business Data Catalogs. You can import data into your SharePoint site from each of these connections using the Data Source properties in SharePoint Designer 2007. This module will show you how you can connect with and configure data sources.



- Overview of each data source
 - Typical application of data sources within SharePoint sites
- Connecting with external databases
 - The role of authentication and data providers
 - Data import options
- Connecting to another SharePoint library within your site collection
- Linking data sources

Module 7: Working with Data Views and Conditional Formatting in SharePoint Designer 2007

You can use data views and data forms to present and configure data sources. In this module, you'll work with data sources to add data to SharePoint pages and manipulate the data display using custom queries and conditional formatting. You'll also learn how you can write data back to the data source using data form web parts.

- Creating a data view
- Importing fields
- Working with conditional formatting
- Editing XPath expressions
- Applying filtering and style
- Working with edit, delete and insert commands

Module 8: Working with ASP.NET Controls in SharePoint Sites in SharePoint Designer 2007

In this module, you'll learn how you configure ASP.NET controls within SharePoint sites and then bind and populate those controls using data connections..

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

Module 9: Creating and Modifying Master Pages

In this module, you'll learn about master pages. Master pages, based on the ASP.NET 2.0 framework, 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. You'll learn how to do the following:

- How to work with the out-of-the-box master pages
- Create new master pages using SharePoint Designer 2007
- Adding and configuring menu controls on master pages
 - How to modify SharePoint Menu Display Properties
- Managing master pages



- Applying CSS to master pages

Module 10: Working with Content Pages

In this module, you'll also learn about the relevance of content pages, known as page layouts in SharePoint Server 2007, and how page layouts and master pages work hand-in-hand to determine the final composition of SharePoint pages.

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

Module 11: Working with Cascading Style Sheets

In SharePoint, you can apply a custom style sheet to either a single site or an entire site collection. In this module, you'll learn all about the SharePoint cascading style sheet (CSS) files, including understand how to modify the out-of-the-box CSS and create new CSS files along with best practices for working with and managing SharePoint CSS files.

- Reviewing the out-of-the-box CSS files and classes
- Modifying out-of-the-box CSS files
- Creating new CSS files and managing the CSS lifecycle

Module 12: (Optional) Branding your Corporate Site

In this module, you'll use the techniques learned in the earlier modules to customize a SharePoint site to match the look and feel of your existing intranet or internet. You will use the in-browser and/or SharePoint Designer 2007 tools to work with your design. You may choose to create a new master page and apply styling to transform the out of the box design to match your corporate brand.

- Self-paced, design exercise

Module 13: Saving Sites as Templates

This module will show you how you can save a customized site as a template, both using the in-browser and SharePoint Designer 2007 tools, which you can then use when creating new sites in SharePoint.

- Look at the differences between *templates* and *site definitions* in SharePoint.
- Export or save your customized site as a SharePoint Site Template
- Create a new site in SharePoint based on your custom template

Module 14: Creating In-browser Workflows

In this module, you'll learn how to effectively work with the default workflows via the browser and create workflows for document libraries and lists throughout your SharePoint sites.



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

Module 15: Creating Workflows in SharePoint Designer 2007

In this module, you'll learn about taking workflow creation to the next level by creating workflows using SharePoint Designer 2007.

- The relationship between SharePoint Designer 2007 workflows and Windows Workflow Foundation
- Walkthrough a basic workflow creation in SharePoint Designer 2007 using the Workflow Designer wizard.
 - Working with events, actions, conditions and steps.
- Location and composition of workflow files
- Deploying workflows created in SharePoint Designer 2007 to SharePoint document libraries and lists

Module 16: Creating a Multi-step Workflow

In this module, you'll take create a workflow for a custom list within a SharePoint site and build a multi-step workflow, which includes certain conditions being met before **e-mailing** customers and **updating**, and **copying** list items. You'll also include a custom form in the workflow solution to retrieve data from users.

- Create a custom list on your SharePoint site.
- Use the SharePoint Designer Workflow Designer wizard to create your custom workflow.
- Save and execute your workflow
- Run the workflow and review workflow status in your SharePoint site
- Review workflow logs on the SharePoint server.

