

# SharePoint Designer – Best Practices & Hints and Tips

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## Agenda

- u Why Not Allow Usage of SPD?
- u When To Use SPD?
- u How to Prevent Usage of SPD:
  - § Site Level
  - § Global Level
- u Best Practices
- u Hints and Tips

## Why Would You Not Want to Give Users Access to SPD?

### Types of Sites

Large  
Number of  
People

Internet Sites

Collaboration  
Sites



Small  
Number of  
People

SharePoint Server 2007 Provides Two Type of Sites

## Types of Sites

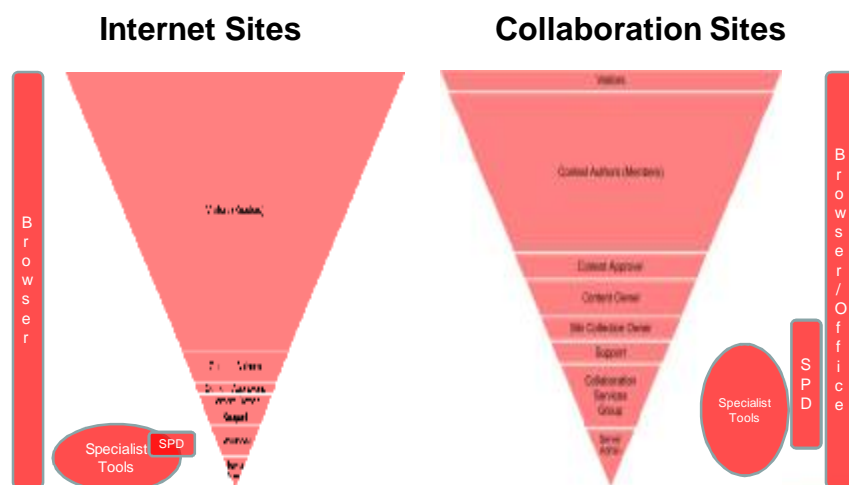
### Publishing Sites

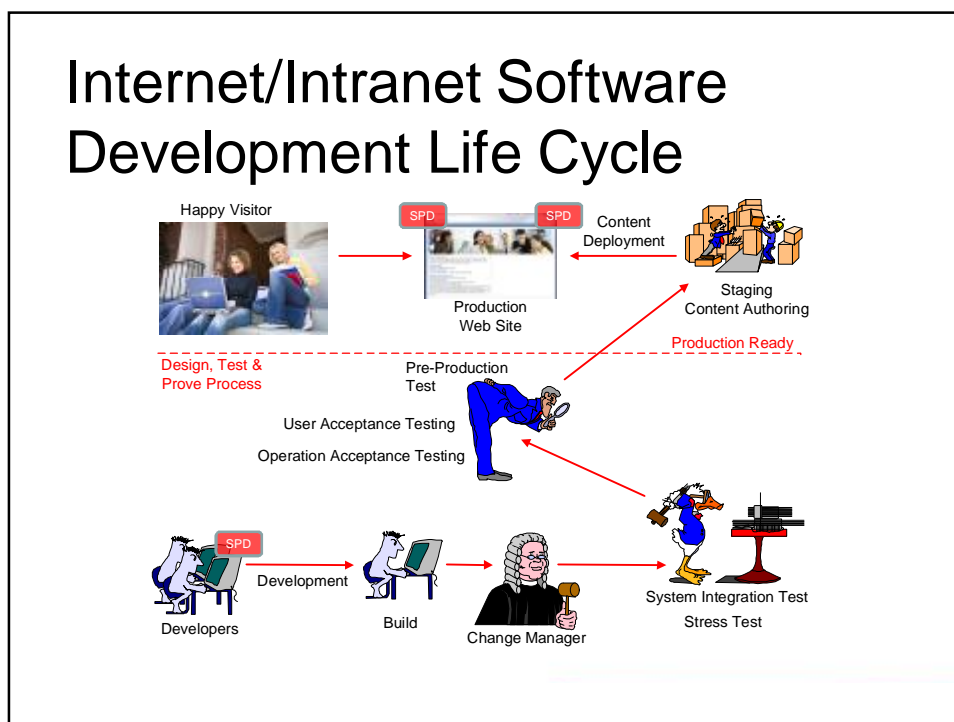
- u Shop Fronts
- u Large Number of Readers
- u Small number of content authors
- u Page content Approval Process
- u Resources, such as Images preloaded
- u Branding / Look and Feel Very Important
- u Internet / Intranet Web Sites

### Collaboration Sites

- u Factories – team sites
- u Small number of Readers
- u Large number of people who contribute content
- u Page Content goes live immediately

## Usage Scenarios





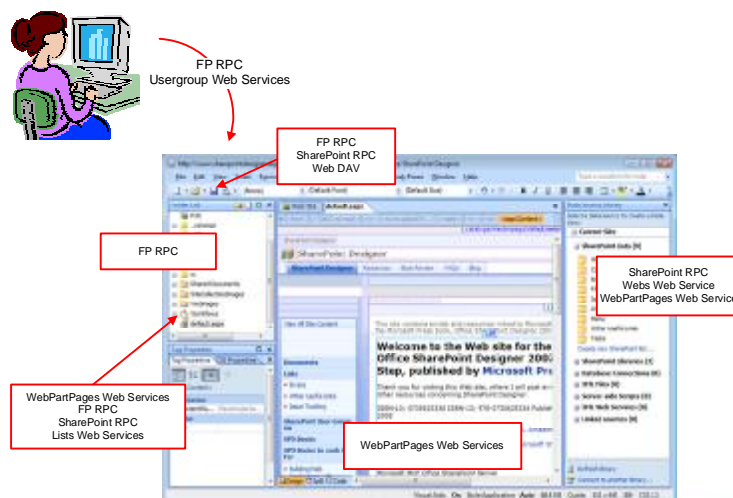
## Why May a Developer / Business Analyst Need to Use SPD?

- u Tool of choice for:
  1. Data View/Form Web Part design
  2. Page Layout, CSS, etc. Prototyping
  3. Workflow prototyping (port to VS.NET)
  4. Things that can't be done in the browser
  5. Generate contributor settings XML
- u Beyond that, it isn't intended for the professional developer.
  - § Never Alter the Files in the 12 Hive with SPD (Make sure that all 12 Hive customizations are in **source control** in a way that requires developers to use it)

## When May an Information Worker Need to Use SPD?

- u For things you can't do using the browser e.g. Data Form Web Part, Web Zone Properties and hiding lists
- u To brand SharePoint sites when the scope of the customization will never need to go beyond a single Site Collection.
- u SPD (and the Browser) - GREAT prototyping Tool
- u NOT to be used for everyone: Primarily a tool for the technically savvy end user to uniquely customize SharePoint components at the site-level.

## How to Prevent Usage of SPD



## How to Prevent Usage of SPD: Site Level

- u Site Permissions
  - § Use Appropriate Roles
  - § Permissions Levels Linked to Editing a Site with SPD:
    - Full Control
    - Design Permission
  - § Don't Just Use the OOTB Permission Levels
  - § Three Permissions to Consider
    - Add and Customize Pages
    - Browse Directories
    - Manage Lists
  - § Cannot Override Permission Settings at:
    - Server Level
    - Web Application Level
- u Contributor Settings
  - § Guide Trusted Users
  - § NOT A SECURITY FUNCTION
  - § Cannot Override Permission Settings

## How to Prevent Usage of SPD: Global Level

- u Central Administration Web Site
  - § Server Level – per Site Definition
  - § Web Level:
    - All Users: Remove Permissions
    - Per User or Group: Policy
    - User-Defined Workflows
- u Active Directory Group Policy
  - § Per Computer or Per User

## Locking Down Internet/Extranet Sites

- u Prevent the Use of SPD
  - § From Both Internet and Intranet Networks?
  - § Techniques Previously Discussed
  - § Restricted to Specific IP Addresses
- u Do Not Publish:
  - § Administration Pages, e.g., Site Settings
  - § Web Services
  - § WebDav, Remote Procedure Calls

## Why Prevent Usage of SPD: Summary

- u What Type of Web Site?
  - § Internet – Public Facing
  - § Internet – Internal
  - § Collaboration sites
- u Governance
  - § Central control over Look and Feel
  - § Web Application Policy
- u Stability
- u Security
  - § Malicious Attacks – Lower Attack Surface

## Best Practices – Don't

1. “*Customize*” a Page based on a File in the “12” Hive
2. Install SPD on SharePoint Server
3. Develop a new Web Part when:
  - § It's already provided Out of The Box
  - § The Data View Web Part can be used
4. Customize when
  - § SharePoint provides it Out of The Box
  - § Don't build a Master Page when a CSS theme will suffice.
  - § Don't edit the Out of The Box CSS files

## Best Practices - Do

5. Practice First
  - § Virtual Machine/Test Environment
  - § Own Site Collection
  - § Own Site
  - § Own Page
6. Make sure you have a way back
  - § Create a New Page and save into a Version-Enabled Document Library
  - § Existing Page
    - Create a Copy
    - Make your Amendments to your Copy
    - Make your Copy Active
  - § Remember Web Part Properties in Web Part Zones are not versioned.

## Hints and Tips

- u Only One SPD Window At a Time
- u Forms Based Authentication – Sign-on in Browser First
- u Create a Definitive Data Source Library
  - § At Top-Level Site
  - § At Sub-Site Link to Top-Level DSL
- u Problem Solving: Web.config
  - § <SafeMode CallStack = “true”
  - § <customErrors mode=“Off”
- u Web Part Maintenance Page
  - § Add **?Contents=1** to Pages URL

## Summary

- u Learn more about:
  - § SharePoint Out of The Box and the Browser
  - § What makes SharePoint Tick
- u Build up your Web Skills
  - § HTML
  - § Usability Standards
  - § XSLT
  - § CSS
  - § ASP.NET / User Controls

## SharePoint Designer Usage References

- u Office SharePoint Designer: Is it Evil?? by David McNamee: a Mike Gannotti's Weekly Webcast:  
<http://sharepoint.microsoft.com/blogs/mikeg/Lists/Posts/Post.aspx?ID=1594>
- u SharePoint Designer and Governance:  
<http://thorprojects.com/blog/archive/2008/02/12/sharepoint-designer-and-governance.aspx>
- u The Great Debate: SharePoint Designer vs. Custom Site Definitions:  
<http://www.binarywave.com/blogs/eshupps/Lists/Posts/Post.aspx?ID=146>

## Locking Down SPD

- u SPD Team Blog – “Locking down SPD”  
<http://blogs.msdn.com/sharepointdesigner/archive/2008/11/25/locking-down-sharepoint-designer.aspx>
- u How to prevent SharePoint Designer 2007 users from changing a Windows SharePoint Services 3.0 site or a SharePoint Server 2007 site  
<http://support.microsoft.com/kb/940958/en-us>
- u Web Application Policies:  
<http://blogs.msdn.com/joelo/archive/2007/04/02/web-application-policies.aspx>

## Locking Down References for IT Pros

- u Plan security hardening for server roles within a server farm (SharePoint Server):  
<http://technet.microsoft.com/en-us/library/cc262849.aspx>
- u Plan for secure communication within a server farm (SharePoint Server):  
<http://technet.microsoft.com/en-us/library/cc262849.aspx>
- u Review the secure topology design checklist (SharePoint Server):  
<http://technet.microsoft.com/en-us/library/cc262849.aspx>
- u Best Practices Book, Chapter 20, "Intranet, Extranet, and Internet Scenarios"
- u 25 Tips to Lockdown Your SharePoint Environment:  
<http://blogs.msdn.com/joelo/archive/2007/02/03/25-tips-to-lockdown-your-sharepoint-environment.aspx>
- u Anonymous Users, Forms Pages, and the Lockdown Feature:  
<http://blogs.msdn.com/ecm/archive/2007/05/12/anonymous-users-forms-pages-and-the-lockdown-feature.aspx>

## jQuery

- u Easy Javascript
- u Lightweight – 55kb
- u Cross browser supported
- u Integrated into VS 2010
- u VS 2008 hotfix available
- u Plugins – <http://plugin.jquery.com>

## jQuery - Syntax

### u Selectors

- § \$("someID")
- § \$(".text")
- § \$(".someClass")
- § \$("#sometable tr:even")

### u Events

- § Click, focus
- § Show, hide, slideup, slidedown, fadein
- § \$(".myClass").show("slow",someFunction)

## Some Other Parts...

- u Data View/Form
- u Form Web Part