

SharePoint Designer – Designing Pages, Lists & Libraries

Quick Guide

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4/22/2013

Version 2.0



This document provides information and procedures for those with **Designer permissions**. Designers can create lists, document libraries and edit pages.

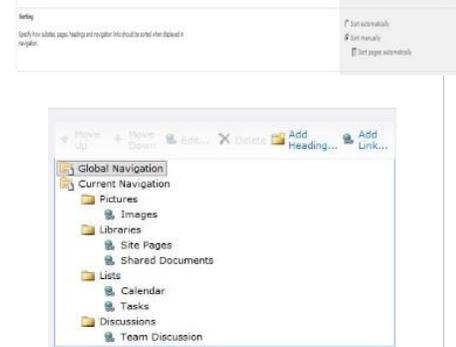
Designing Pages, Lists and Libraries

Managing Navigation

Modify top navigation (or Global navigation) and left navigation (or Current navigation)

You can modify the top (Global) navigation or left (Current) navigation as follows:

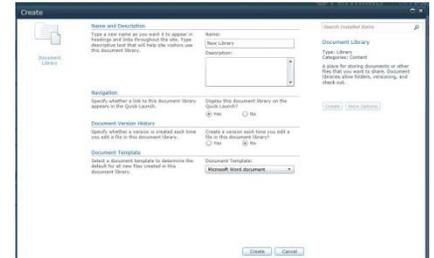
1. Select “Site Actions” then “Site Settings”.
2. From the Site Settings page that appears, in the Look and Feel area, select “Navigation.”
3. From the Navigation Settings page that appears, in the Sorting section, select “Sort manually.”
4. In the Navigation Editing and Sorting section, select the “Global Navigation” or “Current Navigation” folder to modify the top or left navigation and click “Add Heading” or “Add Link” depending on what you want to add.
5. Add a new header or link and click “OK.”
6. You can click a heading or link to select it and then click “Move Up” or “Move Down” until the menu item is in the order you prefer.
7. Click “OK” to accept your changes.



Working with Document libraries

Create a Document Library

1. From the Site Actions menu, click “More Options.”
2. From the Filter By menu, select “Library.”
3. Select the “Document Library” icon.
4. Click “more Options” and update settings for your library including:
 - a. Adding a title
 - b. Choosing whether or not a link to this document library should appear in the Quick Launch menu...
 - c. Choosing whether or not a version is created each time you edit a file in the library...
 - d. Choosing whether you can select a document template as a default for all new files created in this document library...
5. Click “Create” to save your changes.



Your new document library will automatically appear as an option on the left menu under the Library heading.

Require check-out of files

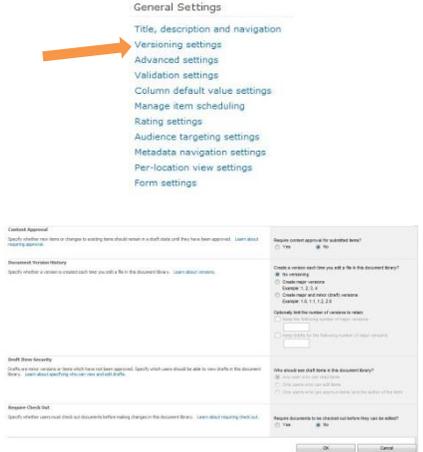
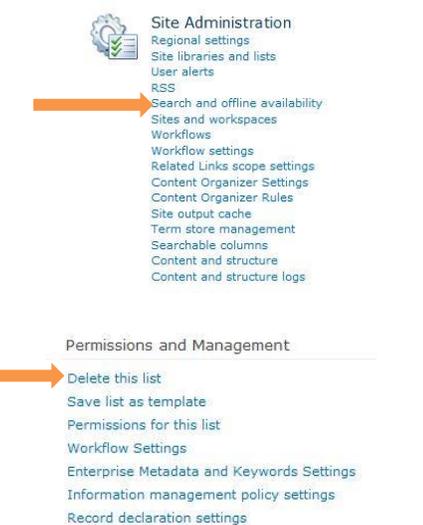
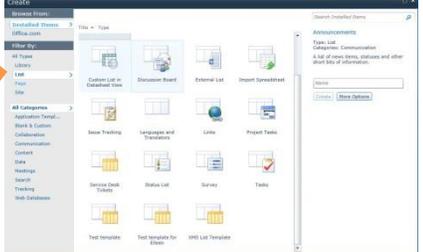
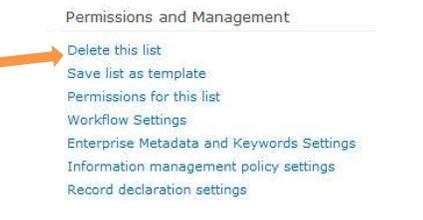
You can set up a document library so that users must check out files before they can update them.

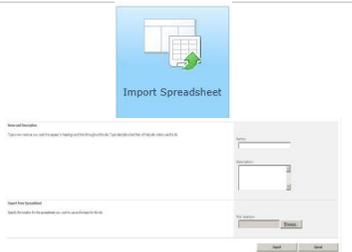
1. From the Library Tools menu, select “Library Settings”.
2. From the Document Library Settings page that appears, in the General Settings area, select “Versioning settings.”
3. From the Versioning Settings form that appears, in the Require Check Out area, select “Yes.”
4. Click “OK.”

The next time a user tries to open a file, a check out will be required.

 **NOTE:** Newly uploaded files are automatically checked out and must be checked in to be visible to users.

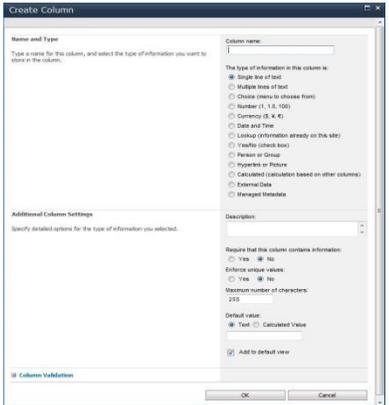


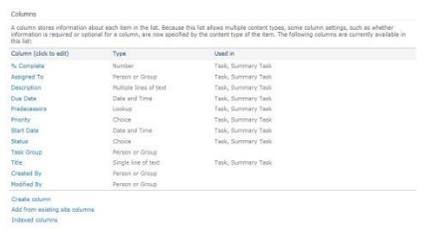
<p>Enable versioning for a library</p>	<p>You can set up a document library so that versions of documents in that library are saved and can be restored.</p> <ol style="list-style-type: none"> 1. From the Library Tools menu, select “Library Settings”. 2. From the Document Library Settings page that appears, in the General Settings area, select “Versioning settings.” 3. From the Versioning Settings form that appears, enable your preferred settings: <ol style="list-style-type: none"> a. In the Document Version History area, you can select to create either major versions only or major and minor versions and to optionally limit the number of versions. 4. Click “OK” to enable versioning for the library. 	
<p>Delete a document library</p>	<ol style="list-style-type: none"> 1. From the Site Settings page, in the Site Administration area, select “Site Libraries and Lists.” 2. From the Site Libraries and Lists page, select the library you want to delete. 3. On the List Settings page that appears, from the Permissions and Management area, select “Delete this list.” 	
<p>Working with Lists</p>		
<p>Create a list</p>	<ol style="list-style-type: none"> 1. From the Site Actions menu, click “More Options.” 2. On the Create page, in the Filter By area, click the “List” link. 3. Click the icon for the kind of List you want to create. 4. Type a name for your List in the Name text box. 5. Click “Create” to create the list. 	
<p>Delete a list</p>	<ol style="list-style-type: none"> 1. From the Site Actions menu, select “Site Settings.” 2. From the Site Settings page, in the Site Administration area, select “Site Libraries and Lists.” 3. From the Site Libraries and Lists page, select the list you want to delete. 4. On the List Settings page that appears, from the Permissions and Management area, select “Delete this list.” 	

<p>Import a spreadsheet to create a list</p>	<ol style="list-style-type: none"> 1. From the Site Actions menu, click “More Options.” 2. On the Create page, in the Filter By area, click the “List” link and select “Import Spreadsheet.” 3. Click “Create.” 4. Fill out the Name and Description field. Then click “Browse” in the Import from Spreadsheet area. 5. Select the spreadsheet to import and click “Open.” 6. Click “Import.” 	
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<p>Create a custom list</p>	<ol style="list-style-type: none"> 1. From the Site Actions menu, click “More Options.” 2. On the Create page, in the Filter By area, click the “List” link and select “Custom List.” 3. Name your list and click “Create” to create it. 	
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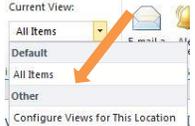
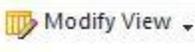
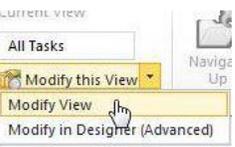
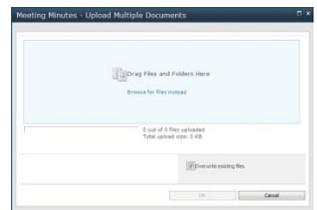
Working with List Columns

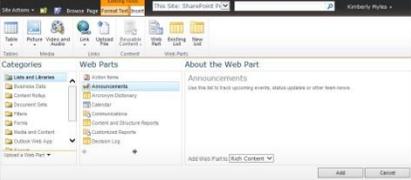
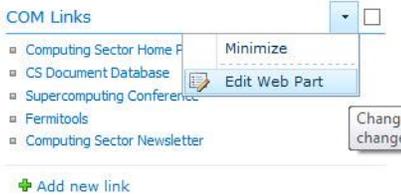
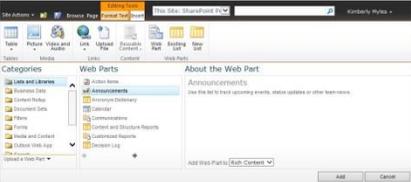
<p>Add a column from the list menu</p>	<ol style="list-style-type: none"> 1. Select the library you want to work with. 2. Click the “library” tab from the Ribbon. 3. From the Create Column form that appears, name your column and select the type of information that will appear in this column such as single lines of text, date and time, choice column (where you can create multiple drop-down options), calculated column, check box or radio button items. 4. From the ribbon, click “Create Column.” 5. In the form that appears, enter a name for the column and select the type of information you want to store in the column. 6. Click “OK” to save. 	
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<p>Add a column from the List Settings menu</p>	<ol style="list-style-type: none"> 1. Navigate to the list you want to work with. 2. From the List menu, select “List Settings.” 3. On the List Settings page that appears, scroll down to the bottom of the page to the Columns area and select the “Create column” link. 4. From the Create Column form that appears, make your selections and click “OK” to create your column. 	
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Working with Views

<p>Create a view</p>	<p>You can create a view for a list (or library) and show or hide columns for that list (or library) in your new view.</p> <ol style="list-style-type: none"> 1. From the List tab, select “Create View.” 2. Select “Standard View.” 3. In the form that appears, name your view and select whether you want the view to be personal (for only you to see) or public. 4. In the Columns field, enable checkboxes next to each column you want to display (or uncheck the columns you want to hide.) 5. Order the columns by selecting a number next to each column name. 6. You can filter your columns by entering conditional statements in the Filter field. 7. You can group your list by choosing either one or two 	 
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	<p>columns to group your list by from the Group by field.</p> <ol style="list-style-type: none"> Click “OK” to save your view. Select your view from the list tab dropdown menu under Current View to display that view of your list. <p></p> <p> NOTE: SharePoint lists can contain large amounts of data. For best performance in rendering information, the best practice recommendation is to limit views to 100 items within groups. There is a default all Items view that should be modified to conform to this best practice.</p>	
<p>Modify an existing view</p>	<ol style="list-style-type: none"> From the List (or Library) tab, select “Modify View.” In the Edit View form that appears, make updates such as changing the order of columns, adding “group by”, “filter” or Sort criteria. Click “OK” to save your changes. Your view will now be updated to reflect your changes. 	
<p>Delete a view</p>	<ol style="list-style-type: none"> From the List (or Library) tab, select the view you want to delete from the Current View drop-down list. Select “Modify this View.” In the top area of the form that appears, click “Delete.” Click “OK” to accept and delete the view. <p> Tip: For more information regarding views, please see the following official procedures from Microsoft: http://office.microsoft.com/en-us/sharepoint-server-help/create-modify-or-delete-a-view-HA010377693.aspx</p>	
<p>Working with Pages</p>		
<p>Create a page</p>	<ol style="list-style-type: none"> From the Site Actions menu, click “More Options.” On the left menu, under the Filter By area, click the “Page” link and the “Page” icon. Type a name for your page in the Name field and click “Create” to publish the page. 	
<p>Edit site content</p>	<ol style="list-style-type: none"> To edit a page, select the paper and pencil icon from the top menu to enter edit mode. (You can also select “Site actions” and the “Edit page” button). Select the “Format Text” tab from the Editing Tools menu to access editing options (including font, font color, font size, text layout, markup styles and styles.) To edit an image, click on the image to get the Picture Tools menu, from this menu you can customize the size and position of your image and add a URL or alt text for your image. Click the Save icon from the top menu (or the Save & Close icon from the ribbon) to save changes. 	 

<p>Insert a site image</p>	<ol style="list-style-type: none"> 1. To add an image, select the paper and pencil icon from the top menu to get in edit mode. 2. Place your cursor on the area of the page where you want to insert an image. 3. From the Insert tab, select the “Picture” option. 4. From the popup window that appears, click “Browse” to find a local copy of the image you want to insert. 5. Click “Open” to insert the image. 	
<p>To insert a Web Part</p>	<ol style="list-style-type: none"> 1. Navigate to the page that you want to insert a Web Part in. 2. Click the “Page” tab. 3. From the ribbon, select “Edit Page.” 4. From the Editing Tools menu, select the “Insert” tab. 5. From the ribbon, select “Web Part.” 6. Select the Web Part that you want to include i.e. Links list or Content Editor etc. and click “Add” to add the Web Part to your page. 	
<p>To edit a Web Part</p>	<ol style="list-style-type: none"> 1. Navigate to the Web part that you want to maintain. 2. Hover over the far right area of the Web Part’s title until you can click on a small downward pointing arrow. 3. From the dropdown menu that appears, select “Edit Web Part.” 4. From the form that appears, make your updates and click “Apply” to apply these changes and “OK” to accept and save your changes. 	 
<p>To Delete a Web Part</p>	<ol style="list-style-type: none"> 1. Navigate to the Web part that you want to delete. 2. Hover over the far right area of the Web Part’s title until you can click on a small downward pointing arrow. 3. From the dropdown menu that appears, select “Delete Web Part.” 4. Click “OK” to confirm that you want to delete the Web Part. The Web Part is now deleted permanently. 	