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microsoft sharepoint designer 2010 step by step step by step microsoft

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Introduction

When it comes to building and customizing intranet sites, the Microsoft SharePoint ecosystem has long been a cornerstone for enterprises worldwide. Among its many tools, **SharePoint Designer 2010**stands out as a powerful, yet user friendly, application that bridges the gap between developers and business users. Whether you're looking to create custom workflows, design sophisticated page layouts, or tweak list and library settings, this step by step guide will walk you through every major feature of the application, ensuring you get the most out of your SharePoint environment.

In this article, we'll cover everything from installation and site connection to advanced customization and troubleshooting. By the end, you'll have a solid understanding of how to harness the full potential of **Microsoft SharePoint Designer 2010 step by step step by step microsoft**—a phrase that captures the essence of our detailed, methodical approach to mastering this tool.

What is SharePoint Designer 2010?

SharePoint Designer 2010 is a free, downloadable application from Microsoft that extends the capabilities of SharePoint 2010 and SharePoint 2013. It allows you to:

- Design and edit web pages, lists, libraries, and site templates.
- Create and manage custom workflows using a visual designer.
- Build data views and integrate external data sources.
- Modify navigation, branding, and themes.
- Publish and version control content directly from the designer.

Unlike the classic SharePoint Designer 2007, the 2010 version supports the new SharePoint 2010 site templates and introduces the Workflow Manager integration, enabling more complex business processes.

Installing SharePoint Designer 2010

Step 1: Download the Installer

Microsoft offers SharePoint Designer 2010 as a free download. Visit the official Microsoft Download Center and locate the latest version compatible with your operating system. Be sure to choose the correct architecture (32 bit or 64 bit) that matches your Windows installation.

Step 2: Run the Setup

1. Double click the downloaded .exe file to launch the installer.
2. Accept the license agreement and click Install.
3. Choose the installation folder or leave the default location.
4. Wait for the process to finish and click Finish.

Step 3: Launch the Application

After installation, you can start SharePoint Designer 2010 from the Start menu or by searching for “SharePoint Designer.” The first launch may take a few seconds as the application performs initial setup tasks.

Connecting to a SharePoint Site

Step 1: Open the Site Connection Dialog

Upon launching the application, you’ll be prompted to open a site. Click **Open Site** or navigate to **File > Open Site** if you’re already working on a project.

Step 2: Enter Site URL

Type the URL of the SharePoint site you wish to customize. For example: https://contoso.sharepoint.com/sites/HR. If you’re working with a local SharePoint installation, use the local URL such as http://localhost/sites/HR.

Step 3: Authenticate

Depending on your environment, you may be prompted to log in with your credentials. For on premises SharePoint, use your domain username and password. For SharePoint Online, enter your Office 365 credentials.

Step 4: Verify Connection

Once connected, you’ll see the site’s structure in the **Site Map** pane on the left. The **Ribbon** at the top will now display SharePoint Designer options specific to the selected site.

Customizing Lists and Libraries

Step 1: Open the List or Library

In the **Site Map**, navigate to the list or library you want to modify. Double click it to open the **List Settings** page.

Step 2: Add or Remove Columns

Use the **Columns** section to add new fields or delete existing ones. For each new column, specify the type (e.g., Single line of text, Choice, Lookup) and configure any additional settings.

Step 3: Create Custom Views

1. Click List on the Ribbon, then choose Create View.
2. Select the view type (Standard, Datasheet, Calendar, etc.).
3. Configure columns, sorting, filtering, and formatting options.
4. Save the view and give it a descriptive name.

Step 4: Configure List Workflow Settings

Navigate to **Workflows** within the list settings to attach existing workflows or create new ones. You’ll use SharePoint Designer’s workflow editor for this step.

Creating and Editing Pages

Step 1: Add a New Page

1. In the Site Map, right click the Pages folder.
2. Select New > Web Part Page or New > Publishing Page, depending on your site template.
3. Choose a layout (e.g., 2 Column, 3 Column) and provide a page name.
4. Click Create.

Step 2: Design the Page Layout

Use the **Design View** to drag and drop web parts, text boxes, and images. For a more granular approach, switch to **Code View** and edit the HTML directly.

Step 3: Add Data View Web Parts

To display list or library data:

- Open the page in Design View.
- Click Insert > Data View and choose the source list.
- Configure the fields, sorting, and filtering as needed.
- Save the page.

Step 4: Publish and Check In

After finalizing the page, click **File > Save**, then **File > Check In** to make it available to site users. If you're using a publishing site, you may also need to **Publish** the page.

Building Workflows with SharePoint Designer 2010

Step 1: Create a New Workflow

1. In the Site Map, right click the Workflows folder.
2. Select New > List Workflow and choose the target list.
3. Give the workflow a name and click Create.

Step 2: Design the Workflow Logic

The workflow editor offers a visual interface. Drag actions onto the canvas and configure their properties. Common actions include:

- Set Field in Current Item – Update a field value.
- Send an Email – Notify stakeholders.
- Start Approval Process – Initiate a multi step approval.
- Wait for Condition – Pause until a condition is met.

Step 3: Define Workflow Triggers

Set when the workflow should run:

- Start when an item is created
- Start when an item is changed
- Start manually

Step 4: Publish the Workflow

After configuring the workflow, click **Save** and then **Publish**to make it active on the list. Test the workflow by creating or updating an item and verifying the expected actions occur.

Using Data View and Data Form Web Parts

What Are They?

Data View Web Parts (DVWP) allow you to display data from lists, libraries, or external data sources in a flexible, customizable format. Data Form Web Parts (DFWP) are similar but are specifically used for input forms.

Step 1: Insert a Data View Web Part

1. Open a page in Design View.

2. Select Insert > Data View.
3. Choose the source (list, library, or external data).
4. Drag fields onto the design surface.

Step 2: Customize the View

Right click the DVWP and choose **Customize Data View**. You can modify the XSLT, apply CSS classes, or add conditional formatting.

Step 3: Deploy the Web Part

After customization, click **File > Save** and **Check In** the page. The web part should now display the data as configured.

Working with Templates and Themes

Step 1: Access the Master Page Gallery

Navigate to **Site Settings > Master pages and page layouts** to view existing master pages. In SharePoint Designer, open the **Site Map** and expand the **Master Page Gallery**.

Step 2: Edit a Master Page

Right click a master page and select **Open in Design View**. Make layout changes, add custom CSS, or modify navigation elements.

Step 3: Apply a Theme

From the Ribbon, go to **Design > Theme** and choose a pre built theme or create a custom one. Themes control colors, fonts, and background images site wide.

Step 4: Save and Publish

After editing, click **File > Save**, then **File > Check In**. If your site uses publishing features, you may need to **Publish** the master page for changes to take effect.

Publishing and Versioning

Version Control Basics

SharePoint automatically tracks changes to lists, libraries, and pages. Each time a document is checked in, a new version is created.

Step 1: Enable Versioning

1. Navigate to the library or list settings.
2. Click Versioning Settings.
3. Choose Create major versions or Create major and minor (draft) versions.

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