# Lab 10: Create a new WCM Master Page

#### Objectives

After completing this lab, you will be able to:

* Give rights to users
* Disable the default workflow in the development environment
* Use SharePoint Designer for creating, designing, and applying a new Master Page.

#### Prerequisites

Before working on this lab, you must have:

* Labs 1 and 2 fully completed

#### Scenario

In this lab, has a web designer, you will create and modify a new Master Page. Once created, you will then apply the new Master Page to the desired site section.

##### Estimated time to complete this lab: 60 minutes

### Exercise 1 Create a test Publishing Site

For convenience, it would be better to create/modify/test a new Master page on a sub site of you development environment rather than to the top level site of your site collection. It will be easier to recover from potential problems caused by incorrectly configured or designed Master page file.

* Create a new Publishing site to apply your new customized Master page

1. For this lab, please login as “brianc” on the “litwareinc” domain on your desktop. Brian belongs to the “site owner” role thus will have the rights to modify the look and feel of the site. First log out from the current user and log back in as “brianc” password = pass@word1.



Once logged in, you will create a new Publishing site. **Note:** If this is the first time you logged in as Brian you may need to close the “Manage Your Server” panel but first check the “Don’t display this page at logon” box at the button left of the panel.

1. Before creating a new Publishing site (which you will create to test your new Master Page), you will give Brian the rights to approve new sites and pages creation in and under the “Sites” hierarchy. By allowing Brian to approve his own sites and pages you will need to use a lesser amount of clicks to make things work i.e. the need to log in as a different user to approve the page and login in again as Brian to continue further site modification. To give Brian the rights to approve, launch you browser and from the default site home page “<http://hol.litwareinc.com/Pages/Default.aspx>” click on “**Sites**”.
2. Once on the “**Site Directory**” site, click on “**Site Actions**”, then “**Site settings**”, then “**People and Groups**”.
3. Once in the ‘**People and Group**s” page, select “**Groups**” from the top left navigation
4. Click the “**Approvers**” group
5. Click **New**, **Add Users**
6. In the “Add Users: Sites” page, type “**litwareinc\brianc**” in the Users box and click “Check Names”
7. Make sure the Approvers [Limited Access, Approve] is set in the Give Permission drop down and click **Ok**
8. Now that Brian Cox has the rights to approve on this site structure, click the “**Sites**” link to return to the location where you will create the new site based on a “**Publishing**” site template.
9. On the Site Directory page, click “**Create Site”**
10. In the “**New SharePoint Site**” page, enter “**My WCM Site**” (WCM = Web Content Management) in the Title field, “**MyWCMSite**” in the Web Site Address field, click the “**Publishing**” tab and select “**Publishing Site**” as the selected Template.
11. Click **Create**
12. Click “**Publish**”

The “**My WCM Site**” site is now approved and published!

### Exercise 2 Disable the Default Workflow

As you have probably realized, by default, a new Publishing Site uses the default Approval workflow automatically. To reduce the amount of clicks a developer will need to go through each time he or she modifies a site/page you will need to bypass the default Approval workflow from your development environment. In this case, to further reduce the number of clicks, you will also disable the Versioning and Check in/Check out features.

* Make sure you are logged as “Brianc”

1. To disable the workflow, click the “**My WCM Site**” link in the breadcrumb (this action will return you to the home page of the **My WCM Site**.)

**Note:** If the “**My WCM Site**” site does not appear in the navigation elements (left and top) and you need to locate that site, click “**Site**” and then “**Site Map**”. The “**My WCM Site**” should be listed under “**Sites**”.

1. Click “**Site Actions**”, select “**Site Settings**” then “**Modify Pages Library Settings**”.
2. Select “**Versioning settings**”
3. In the “**Document Library Versioning Settings: Pages**” page, select “**No”** for the “**Required content approval for submitted items**” if not already selected, select “**No versioning**” in the “**Document Version History**” section, and lastly, select “**No”** for the “**Required documents to be checked out before they can be edited?**” in the “**Required Check Out**” section.
4. Click **Ok**
5. Return to the “**My WCM Site**” home page by clicking the “**My WCM Site**” link in the breadcrumb.

### Exercise 3 Create and Edit a new master page in SharePoint Designer

Due to the fact that many page layouts can be use with a single Master page, you will need to understand the design of each of the page layouts utilized with that Master page. In this exercise you will create and modify a new simple Master page that could be used with page layouts. To help understand the design of page layouts and their association with a specific Master page, we will reverse engineer this site. First, we need to determine which “page layout” the home page of the “**My WCM Site**” is based on and then, determine what are the “contentplaceholders” utilized by that page layout. Each one of the contentplaceholders will also be referred to be in the Master page. All page layouts contentplaceholders must be in the Master page but not all Master page contentplaceholders needs to be in page layouts!

* ContentPlaceholders are common to both Page Layouts and Master pages – see the SDK for further information

1. To determine the Page Layout the “**My WCM Site**” home page uses, first navigate to the “**My WCM Site**” home page if not already there, then click on “**Site Actions**”, then “**Edit Page**”. On the editing console of the resulted page, click “**Page**”, then “**Page Settings**”, click **Ok** to the warning panel and take note of the “**Page Layout setting**” – the default Page Layout should be “**(Welcome Page) Welcome page with summary links**”.

**Note:** The “**(Welcome Page)**” part of the “**(Welcome Page) Welcome page with summary links”** page layout name indicates the “Associated Content Type” of that page layout. The “**Welcome page with summary links”** indicates the “**Title**” of the page layout.

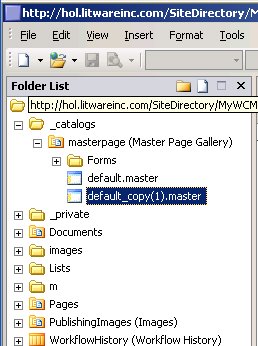
1. Click **Cancel**
2. Our next step will be to determine the “content placeholders” used by the default Page Layout. To determine the “content placeholders” used by the default Page Layout, click on “**Site Actions**”, then ”**Site Settings**”, and then “**Modify All Site Settings**”.
3. Click “**Cancel**” to the message box
4. In the “**Site Settings**” page, under the “**Galleries**” section, click “**Master Page and Page Layouts**”
5. In the “**Master Page Gallery**”, locate the title “**Welcome page with summary links**” page layout which is the “**WelcomeLinks.aspx**” page (you can modify the view to show the Title). The best way to make sure you have the actual correct page layout would be to check the “**Site Content and Structure**” (accessible via the Site Actions menu) for that page and display its “**Related Resources**”.
6. In the down arrow menu of the “**WelcomeLinks.aspx**” page, select “**Edit in Microsoft Office SharePoint Designer**”.
7. Click **Ok** to the message box – SharePoint Designer should launch and open the Page Layout.
8. If this is the first time SharePoint Designer is launched, click **Yes** to the “set the SharePoint Designer as the default Page editor”, then **uncheck** all boxes in the Privacy Option page and click **Ok** – this may take a couple of minutes to fully load the page.

**Note:** In the eventuality that the SharePoint Designer does not launch once you selected the “Edit in Microsoft Office SharePoint Designer” link, you could llaunch the SharePoint Designer from the Start menu, and then open the following site <http://hol.litwareinc.com>. Once opened, expand the “**\_catalogs**” folder first and then the “**masterpage (Master Page Gallery)**” folder and scroll down and click on “**WelcomeLinks.aspx**”. To open the page, right click and select “**open**”. If you took this route, jump to step 11 below.

1. Select “**Code View**” located at the lower section of the middle pane.
2. In the Code page, take note of all ContentPlaceholders referred by their ID. There should be four of them:
   * **PlaceHolderAdditionalPageHead**
   * **PlaceHolderPageTitle**
   * **PlaceHolderPageTitleInTitleArea**
   * **PlaceHolderMain**
3. Close SharePoint Designer and then “**Discard Check Out**” for that Page Layout in the “**Master Page Gallery**”.

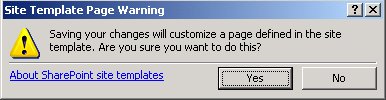
Now that we have the necessary information for our Master page… let create and modify a new Master page.

1. To create a new Mater page for the “**My WCM Site**” site, return to the “**My WCM Site**” site by clicking **Site**, **Site Map**, and then “**My WCM Site**” link from the “Sites” list.
2. Copy the link of the site i.e. <http://hol.litwareinc.com/SiteDirectory/MyWCMSite/> . This will save you the need to browse to this site within SharePoint Designer.
3. Launch **SharePoint Designer** from the Start menu and point it to your “**Publishing**” site i.e. <http://hol.litwareinc.com/SiteDirectory/MyWCMSite>. Use the Open Site option and enter the URL of your site in the Site name field.
4. In the **SharePoint Designer** folder list view, expand “\_catalogs” and “masterpage (Master Page Gallery)”
5. Make a copy of the “default.master” page within the same folder



1. Check out the “default\_copy(1).master” and rename it with your <initials>default.master
2. Double click on your new renamed master page to open it up.
3. In the next few steps, you will now modify this newly created Master page by coping and pasting from an already configured sample Master page. To paste the necessary code from the preconfigured Master page, browse to the “**CustomWCMDefaultMasterPage.txt**” located in the “**C:\HOL\MasterPage**” folder with Windows Explorer.
4. Open “**CustomWCMDefaultMasterPage.txt**” and copy all of its code.
5. Return to SharePoint Designer, select the Code view and select all existing code of copied new Master page and paste. This will replace all existing code with the code of the “**CustomWCMDefaultMasterPage.txt**” file.
6. Save your changes

On save, you will be prompted by the following message, click on **Yes**



***Important Note:*** *The customization referred by this message is also known as to be “unghosted”. When site pages are customized, excluding browser-based customizations such as modifications to Web Parts, the pages become “unghosted” and their contents are stored in the database. Uploaded .aspx files are considered unghosted automatically. The contents of unghosted pages are routed through safe mode parsing in ASP.NET, which prevents server-side code from executing, and which depends entirely on the Safe Controls list specified in the web.config file of the wwwroot directory to determine which controls can be rendered at run time.*

1. Click Yes to the following message
2. To apply this newly created Master page to this site, right click on the new Master page in the “**Folder List**” view (left side of the SharePoint Designer) and select “**Set as Custom Master Page**”. This setting will tell the system to use this Master page for this site from now on.
3. To verify the functionality and its application to the “**My WCM Site**” site, return to your browser and refresh the page.
4. If there are no errors, return to SharePoint Designer and Check Out the new Master page.
5. To have the site return to it original Master page, simple right click on the original “default.master” master page and select “**Set as Custom Master Page**”.
6. Refresh your browser session and all should be back to its original state.
7. Close SharePoint Designer.

Lab Completed!