

Customizing Current Navigation in WSS

This presentation outlines Customizing the Current Navigation Bar available on a Windows SharePoint Services Collaboration Site. Formally known as the quick launch Bar, this Bar can ease navigation to specific content within the site. It can be customized through the User Interface in SharePoint designer programmatically. For the purpose of this demonstration, all permissions have been configured appropriately beforehand in order to protect the content. Let us begin by looking at a Windows SharePoint Services version 3 Collaboration Site.

This Team Site was created using a Collaboration Team Site template and contains a default Current Navigation Bar along the left frame. The first link available in the Current Navigation Bar is the View All Site Content. If we utilize this link, it takes us to the All Site Content page in the View structure titled All Site Content. This lists all the Libraries, Lists, Discussions Boards, Surveys, Sites and Workspaces available throughout Team Site. Notice that each list is a hyperlink, and by clicking on it, you can reach that destination. It is also interesting to note the Current Navigation Bar is available on this page as well as the Home Page. Clearly, Microsoft is giving us more than one way to help our Users reach their desired content. If we return to the Team Site and utilize one of the group headings in Current Navigation Bar such as Documents, we actually are taken back to the All Site Content page again, only this time we are utilizing a view entitled Document Libraries, therefore the only section of the All Site Content page that we see is the Document Library section. The same holds true for the Lists group heading in the Current Navigation Bar. It takes us back to the All Site content page, only utilizing the list view Discussions, same page Discussion Boards view, and Sites, same page Sites and Workspaces view. At any of these pages, if you were to simply drop the view menu down and choose All Site content, you would be looking at exactly the same page you look at when you use the View All Site Content link from the Current Navigation Bar. You see they make it look very different, but it actually all the same page utilizing different views.

Returning to the Team Site home, to make use of the actual indented links that take you to Lists and Library destinations within the Site, simply click on any list or library, and you will reach that destination. For instance, if we click on Tasks under the Lists group, it takes us directly to the Tasks list

available on the Team Site. Now this list was here as part of the template. We did not create this deliberately.

Heading back to Team Site home, if you determine that you need to modify this Current Navigation Bar, you can do so in the Site Actions menu, in upper right area of the page. Bear in mind that the Site Actions menu only shows up for those Users who have the authority to modify the site.

Going into the Site Settings for the Team Site, underneath the Look and Feel category, there is a hyperlink for Navigation. The first decision is whether or not to show SubSites and/or subpages available beneath this Team Site. If we determine we want the Current Navigation Bar to show SubSites and then we return Home, if we add a SubSite underneath the Team Site, and I am just going to call this Test SubSite choosing any template out of which and creating it, now when we go back to the actual Team Site through the breadcrumb trail, we see a listing to the test SubSite appears in Current Navigation Bar.

Returning to the Team Site → Site Settings → Navigation, if we remove that check mark while the SubSite called Test SubSite still exists, it does not appear in the Current Navigation Bar anymore. Another decision you can make in Navigation is whether or not to allow SharePoint to sort the listings automatically for you or if you want to sort them manually. If you decide to sort automatically, you are given metadata choices to sort by Title, Creation Date or Last Modification Date. We are also giving the chance to also sort any of those pieces of metadata in ascending or descending order.

Under the Current Navigation section, we can specify the Current Navigation Bar in three categories. One is to display the same navigation items as the parent. Now in discussing Team Site, we are looking at a top level Collaboration Team Site that was built underneath the Site Directory of a MOSS 2007 portal. If we choose to display the same Current Navigation Bar items as the parent, we would be displaying the Current Navigation Bar available on the MOSS Site Directory. To display the current site would be to display the Team Site that we are visiting and to display the Navigation items below would include the Document Libraries, Lists, Discussion Boards, and SubSites and Subpages, but then there is this additional choice on the middle radio button 'Current Site's Siblings'. If we were visiting a Collaboration Site that was at the same level in a Site

Collection as several other Team Sites, we would see the other Team Sites listed in the Current Navigation Bar.

The third radio button is to display only the navigation items below the current site. This is the default selection and as we look at the Current Navigation Bar available on Team Site, we see that it truly is only listing those items that fall below Team Site. If we change that choice, and let us use the 'display the current site items below and current site's siblings', head back to the Team Site, the Current Navigation Bar looks very different, the grouped headings are gone for each of the items below, we see the Team Site itself, and indented Discussions, Documents, Lists, Peoples and Groups, and Sites groupings. What we have lost is the direct links to Shared Documents, Tasks, Calendar, Discussions, those direct listings are now gone. If a User visiting this site wants to go to the Shared Documents document library from the Current Navigation Bar, they would have to click on Documents to be taken to the All Site Content page in Document Libraries view and then click on Shared Documents.

We also see a sibling Team Site 1, which is another Collaboration WSS Team Site that exists at the same level as our Team Site. They are siblings and we see a link to them as well.

Returning to Site Actions → Site Settings → Navigation one more time and changing to the top radio button 'display the same navigation items as the parent site' really only has the effect if you are modifying the navigation and Current Navigation Bar on a sub site. So rather than change it here, I am going to leave this on 'display current site items below and siblings' and instead I am going to visit that TestSubSite we created earlier. Head into Sites → TestSubSite, now TestSubSite parent is our Team Site and as we look at the Current Navigation Bar on the TestSubSite, we see the Group listings for the different All Site Content page view choices. If we go into Site Actions on the TestSubSite → Site Settings → Modify Navigation and ask him to use the same navigation items as the parent site, now the Current Navigation Bar will take on the personality of the Current Navigation Bar available on Team Site. We see the Parent Team Site, and we see a Sibling Team Site 1.

Returning to Team Site, modifying the Current Navigation Bar, if we chose not to sort automatically but rather to sort manually, we are given the opportunity in the Navigation Editing and Sorting section to reorder the links. For instance, if I wanted

Calendar to appear below Tasks, I could move that down. We can also add additional Links to the Current Navigation Bar. These links can point to External or Internal SharePoint content.

Returning to the Team Site, one last thing we need to look at is Tree View. If I head into Site Actions → Site Settings → under Look and Feel, not choosing the Navigation link, but rather the one below it, Tree View, allows us to Enable Tree View in Navigation. This displays Site Content in the physical structure in which it is organized.

Returning to the Team Site home, and we see the actual site hierarchy, we see the TestSubSite underneath as well as the Shared Documents, Announcements, Calendar, Links, Tasks, Team Discussion items available here in Team Site. So, it adds to the Current Navigation Bar a hierarchal structure. It also brings back to this Current Navigation Bar our direct links to our list object destinations. Notice it is a collapsible list. As we take a look at TestSubSite entry, there is a plus sign in front and when you click that, it will expand the TestSubSite and list all of his content as well. Now I do not have anything created on TestSubSite which is why nothing enumerated.

In this video, you have learnt to customize Current Navigation Bar of a Windows SharePoint Services Team Site, a sub site below the Site Directory and the navigation menus available on the Site Settings pages work according to this architecture. For more information on modifying the Current Navigation Bar of a portal home site in MOSS 2007, please see the video for customizing Current Navigation Bars on a portal home site here on SharePoint-Screencasts.com. For more information on advanced modifications to a Current Navigation Bar using either SharePoint designer or programming, please stay tuned to SharePoint-screencasts.com for more intermediate and advanced videos on these technologies.