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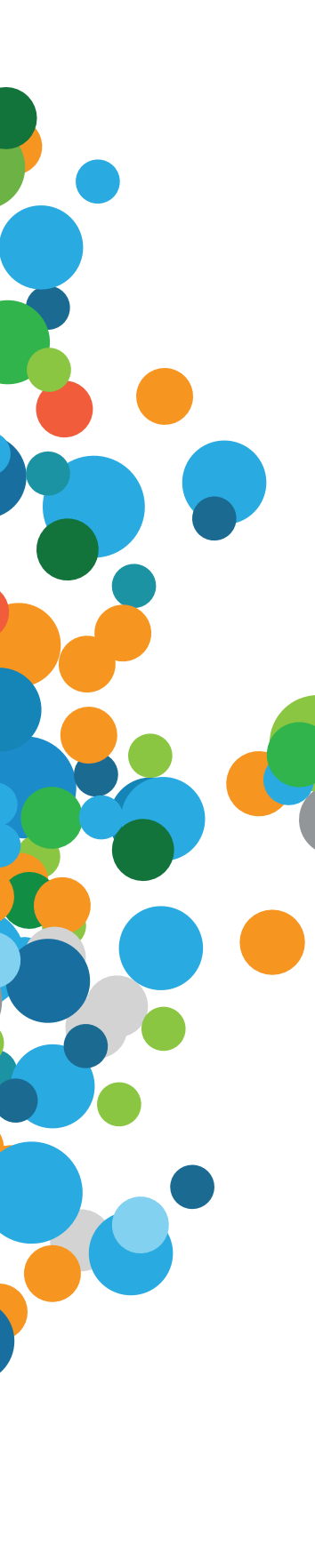
The Basics

- 1 What is SharePoint Branding and UI Design?
- 2 SharePoint Overview
- 3 Working with the SharePoint 2013 User Interface

1

WHAT IS SHAREPOINT BRANDING AND UI DESIGN?





What's in this Chapter

- 1 Reasons for SharePoint Branding
- 2 Exploring Intranet, Internet, and Extranet sites
- 3 Branding SharePoint at Low, Medium, and Full Effort

When most organizations think about SharePoint, style and design for the user interface (UI) traditionally hasn't been one of the first things to come to mind. But as SharePoint has evolved from its humble beginnings as a pure collaboration tool, the UI design has slowly moved up the list with every release. What was once a luxury for most SharePoint sites, custom branding and design are now an important part of every implementation. The old adage is, "You can't judge a book by its cover," and although that may be true, you can tell a lot by comparing the various versions of SharePoint to the earlier editions of this book. Beginning with the first edition of this book on SharePoint 2007 design, each edition has evolved from just another typical looking technical book to the full-color book you are reading today.

Chances are that if you are reading this book, you've already decided to take control of the way SharePoint looks. Perhaps you have a dated intranet that you want to replace with SharePoint 2013. Maybe you want to make your site look more modern and improve the function with better design. Or maybe you just want your site to not look like a SharePoint site.

There are plenty of reasons why people end up on the branding and UI design path, but no matter your reason, it can be difficult to know where to start. The goal of this book is to provide you with all the tools you need to brand your SharePoint sites. This book is structured into four sections, starting with easier concepts and moving to more advanced branding concepts. The first section is an overview of concepts that you must understand before diving into branding topics; as you progress through the book, the topics continue to become more granular. Whether you are new to design work, new to SharePoint design work, or someone who does SharePoint design full-time, there is something in this book for you.

This chapter starts at the highest level and discusses SharePoint branding: what it is and why it is important. You'll get an idea of exactly what branding means in the world of SharePoint. Later, the chapter discusses the branding features in SharePoint 2013 and explains what options are available.

INTRODUCING SHAREPOINT BRANDING

The textbook definition of *branding* is the act of building a specific image or identity that people recognize in relation to your company or product. That’s quite a mouthful! In more simple terms, branding refers to the thoughts and feelings conveyed by a company or product. For example, one of the most iconic brands is Coca-Cola. When you simply see the logo, you can associate feelings or recall good times you’ve had in affiliation with the product—at least that’s what the company hopes. There are plenty of other examples of companies with well-known brands such as Nike, McDonald’s, UPS, Walt Disney, and others. These companies have chosen a marketing identity that enables the public to quickly and easily recognize them. This is branding and is one of the most important things to a company.

“A word is a word, and a picture is worth a thousand. . . but a brand is worth a million.”

—Tony Hsieh, CEO Zappos in *Delivering Happiness*

A company’s branding is applied in many different ways, one of which typically includes a website. On the web, conveying a corporate brand usually involves the colors, fonts, logos, and supporting graphics all pulled together with HTML and CSS to provide the branded look and feel for a site.

You have likely visited a company’s website before, so the idea of what it means to apply branding to a website shouldn’t be a new concept. But when you start to think about SharePoint branding, additional elements are used to create the branding on the screen. The traditional aspects of branding on the web still apply; however, there are more moving parts in SharePoint. Master pages, page layouts, Web Parts, and other pieces are all involved. If you are a traditional web designer, you might be used to approaching a new site as if it were a blank canvas. SharePoint, however, was created to be used out of the box with no changes—applying branding and design essentially require an understanding of how to work with someone else’s code, which in this case is the code generated by SharePoint. This can be a challenge for some who might be new to the world of SharePoint. For example, in an HTML site, if there’s something on the page that you want to remove—say you want to hide the search box—the typical behavior might be to just remove it from the code. One of the most common stories told by designers who are new to SharePoint is just this: they want to remove something from the page and they try to just remove the code. In many cases this simple and familiar act creates an undesirable effect, such as the entire page failing to load and displaying an error message. The point here isn’t to scare anyone, but rather to explain that branding in SharePoint is a little different. Most people don’t consider driving to be too difficult, but you wouldn’t advocate someone who has never driven just to hop behind the wheel without a little guidance.

Why Brand SharePoint?

If you are reading this book, it is likely that you don't need to be convinced to brand SharePoint. Organizations decide to brand SharePoint for a number of reasons, such as to match their corporate brand or even simply to make the new site "not look like SharePoint."

Consider that SharePoint wasn't created with a look and feel that necessarily works best for your organization. Branding isn't just about aesthetics; it also plays an important role in usability and user adoption. Part of the equation is helping users to feel comfortable using a site, which always seems to be an easier proposition when it feels familiar. In a corporate setting, users are inundated with corporate branding, so having a site that matches certainly helps. Branding also helps organizations that have employees geographically dispersed. If all employees log in to the same site, it helps if that corporate brand is reinforced, no matter where the user is located. All that might sound a bit touchy-feely but consider the alternative—a site with little or no branding that doesn't reflect your company's corporate image. In that case, the sky isn't going to fall; however, it isn't too difficult to see how a well-branded site can have a positive impact on its users. It is the same type of feeling you get walking into a well-designed and decorated room. You just get an extra welcoming and harmonious feeling.

As mentioned earlier, branding is a marketing term that has been also applied to SharePoint to refer to changing the look and feel of something. In a more complete sense, SharePoint branding is also often referred to as User Experience (UX) development. That term implies a deeper meaning than aesthetics and starts to show the complete value of why an organization might want to brand its SharePoint site. Although the value aesthetics bring is difficult to quantify, when you start to think about improving the UX for a site, there most definitely is measurable value. As a simple example, think about your company's current intranet or public website. It isn't uncommon for people to say that they think that it is difficult to find things on the current site or that it needs to be redesigned.

So why brand with SharePoint? The answer is going to be different for every organization, but the basic goal is to create a great user experience for anyone that visits the site. There's going to be many factors that ultimately determine what a "great user experience" means for your users. As you read through this book, you'll get a good idea of the options available and what is involved to deliver on those options to create the best possible experience for your users!

Is SharePoint Beautiful?

When you look at SharePoint, what do you think? When you create your first site, is what you see on the screen beautiful? Depending on what template you look at, you might see something different, but in general SharePoint has a distinct out-of-the-box look. Over the years, most would agree that the distinct SharePoint look has improved; although the most common branding request has remained unchanged: Can you make the site not look like SharePoint?

Companies spend lots of money developing their brand. Companies want to stand out in the crowd, which makes sense for many reasons. It isn't much different from how people feel about their personal "brand." Imagine if everyone in the world who worked with Microsoft technologies had to wear the same uniform. Some folks might be perfectly content, but many would prefer to wear whatever makes



sense to them. For some that might mean suits; for others it might mean a shirt, shorts, and flip-flops. Therefore, out-of-the-box SharePoint may be beautiful to you but not to others. However, one thing most can agree on is that it is nearly impossible to come up with a single look for a product that'll work for every organization on the planet using SharePoint. Customization is inevitable.

With the idea that custom branding is a common desire, it begs the question, "How much can I customize the design?" In truth, you'll most likely be more limited by time, budget, and technical resources than you would by SharePoint capabilities to customize a design.

COMMUNICATION VERSUS COLLABORATION

Although SharePoint sites are unique, they all fall into one of three categories: intranet, Internet, or extranet. Each of these SharePoint sites has a different audience and design considerations as part of the planning phase. It is important to note that the intended purpose for your site will have a major impact on your ultimate design.

The next few sections discuss the typical considerations for each of the three environments. At a higher level, each environment consists of many SharePoint sites, and each of these sites is usually designed to primarily facilitate either *communication* or *collaboration*. It is certainly possible to do a little bit of both, but for the core decisions made about branding, most sites favor one more than the other. For example, most of the sites on an organization's intranet fall under the category of a collaboration site because this is where most users store content and collaborate with others on their day-to-day tasks. The intranet home page for most companies is usually also designed as a place to convey information to employees, such as the latest company news, announcements, or events. When users first visit the site, they are taken to this homepage where they are presented with all this information, and from there they navigate to another area of the intranet to do work and collaborate. Effectively harnessing all SharePoint's capabilities into a seamless experience for users is part science and part art.

Branding projects often overlook the importance of determining whether the intended purpose of a site is either collaboration or communication. From a technical standpoint, sites designed primarily for communication or collaboration require different SharePoint templates, which require different approaches to branding. Consider that the approach for branding a SharePoint site based on the Publishing Portal template (which is designed for public-facing sites) is different from a branding site, which is designed purely for internal collaboration.

Considering who uses the site and how they are supposed to use it should be key in creating the design for your site. There's a distinct difference in the intended purpose of a site designed purely for communicating information in a one-way fashion versus a collaboration site designed for a two-way flow of information.

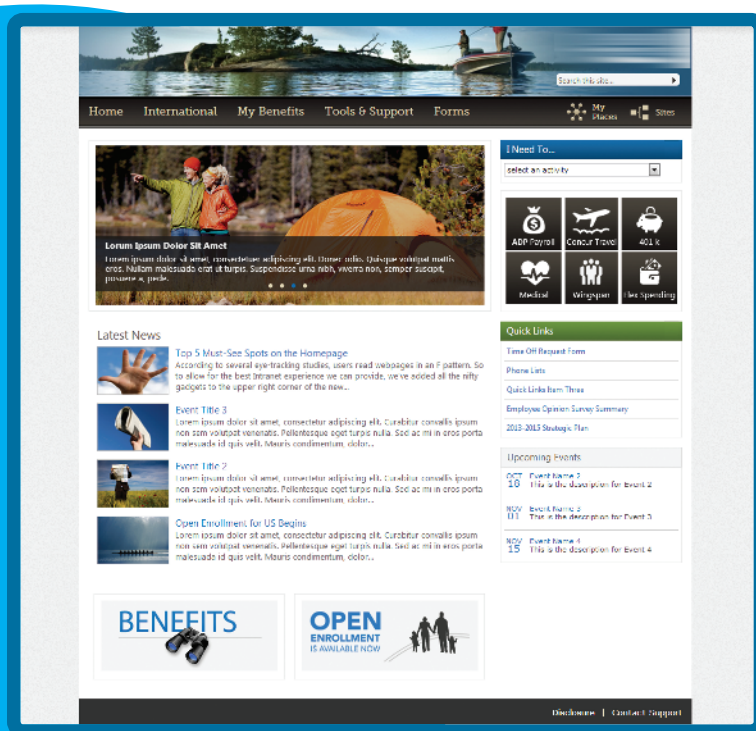


Intranet Sites

Intranet sites are typically available only to employees and partners who connect locally to the network or use a virtual private network (VPN). The focus of intranet sites is to facilitate information delivery and collaboration for specific sets of users. These sites often have multiple content authors, as well as many users who consume the content and collaborate on new content.

Unlike public Internet sites, the browsers and system capabilities of intranet sites are usually controlled by the IT department. This makes designing a SharePoint intranet easier because fewer variables need to be considered. For example, if your organization supports only one browser, your need to design and test is reduced to only that one browser.

As mentioned in the previous section, most intranets are designed to facilitate communication, but the vast majority of sites that are created are of the collaboration variety. Usually, this necessitates a highly customized homepage for the site with subsites that are focused on pure collaboration. Often, intranet sites must be customized to match the look and feel of a company's corporate branding. Following is an example of a custom-branded SharePoint intranet site that uses a custom master page, CSS, and images to create a new look and feel. Note that the version of SharePoint you use impacts the templates you can choose from (discussed more in Chapter 2, "SharePoint Overview").

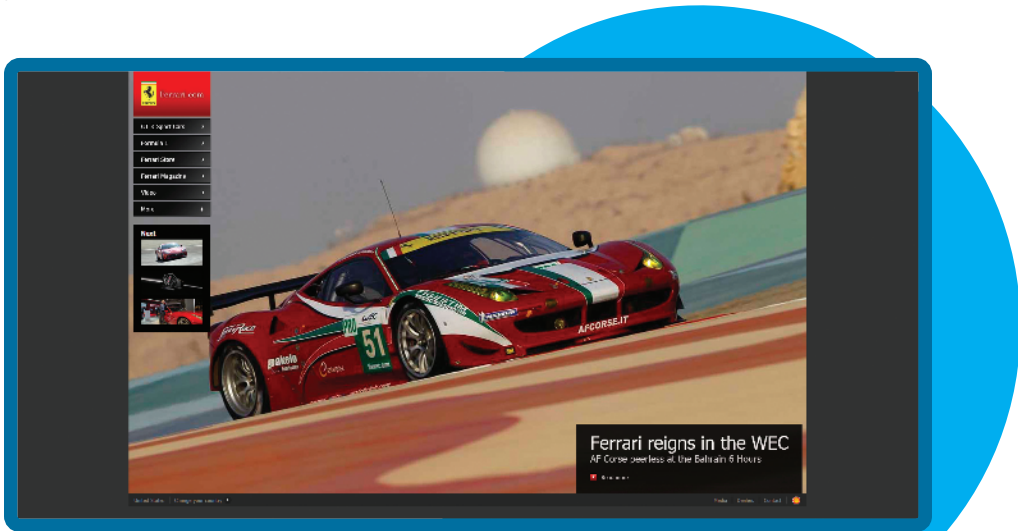


Internet Sites

Internet sites are public-facing and typically have anonymous users visiting them using a variety of Internet browsers and devices. These sites are usually driven by marketing, with only a few content authors and tightly controlled content.

Typically, public-facing Internet sites offer the opportunity to create highly stylized designs. They pose a greater design challenge than internal-facing sites because it is more difficult to control the technology being used by visitors who access the site. In other words, additional effort must be taken to ensure that the site displays properly across all types of browsers and conforms to whatever compliance standards need to be met for the given site. Not only is the creative effort usually greater for an Internet site than for an intranet site, but the actual implementation effort is also typically higher because of the added complexity.

One example of a corporate-branded Internet site that was built with SharePoint is Ferrari.com. It has a highly customized user interface, and without some poking around in the HTML source, it is hard to see any evidence that it uses SharePoint.



Extranet Sites

Extranet sites combine the security and collaboration of an intranet site with the more heavily emphasized branding found in Internet sites. The goal for most extranet sites is to enable external partners to collaborate with an organization. This is usually accomplished by having a public-facing Internet site that users can access initially. When on the site, users enter a username and password to access a secure site, where they can collaborate with users from inside the company. For example, a manufacturing organization might have an extranet site to enable distributors to log in and place orders or to obtain other information to help them sell the organization's products.

The biggest challenge with extranets is usually security. Most organizations want external users to log in to see what they need to see, but no more. Maintaining this balance of security can be tricky. From a branding perspective, it usually means that you must ensure that your branding is consistent across all areas of the site, especially those that extranet users will be accessing.

UNDERSTANDING THE LEVELS OF BRANDING

When you are thinking about your SharePoint branding project, understanding the environment you'll be customizing is the first step. As discussed in the previous section, each environment presents unique challenges. Another consideration is deciding what it is that you plan to actually implement. For instance, have you ever tried to do a home improvement project? Most people have no trouble changing a light bulb; a smaller number of people would be comfortable laying tile in a room; and even a smaller group would be comfortable adding on a new room to their house. The simplest tasks around the house can take a few minutes and are done by just about anyone, but other tasks take more time and require a more complex skillset. Customizing and branding SharePoint is similar. Depending on what you want to accomplish, some tasks require more skill or effort.

The various levels of branding for SharePoint have changed somewhat for SharePoint 2013 because the overall approach to branding has changed a bit more with this release than in previous versions. This section helps set expectations for some of the varied branding tasks in SharePoint and what's required for each level.

Following are three different approaches to create branding in SharePoint:

- **Low effort**—Typically, this approach includes all the branding tasks that an end user with limited training can perform. By using out-of-the-box branding, even someone with little knowledge of traditional website development and design can create a customized site. With out-of-the-box functionality, users can select master pages or composed looks. It is even possible to add a logo image to the top of every site by simply uploading an image and changing the reference in one of the menus (see the example “Replacing the Default Logo on a Composed Look” in Chapter 3, “Working with the SharePoint User Interface.”) All these changes can be made through SharePoint menus and be completed in a matter of minutes.
- **Medium effort**—This approach is good to add some level of unique branding to a site. A medium level of effort would typically require users who have an understanding of CSS and HTML. These users can make changes to the CSS or HTML of a site or even copy and modify out-of-the-box master pages or other SharePoint pages to create custom branding for their site. Medium-effort users would typically make their changes with a design tool such as Dreamweaver or Expression Web. This approach usually takes days or weeks depending on the specific tasks.
- **Full effort**—If your design requirements are highly customized, your only option is the full-effort approach. This involves creating custom master pages, custom CSS, and potentially some custom page layouts. This approach is good for those who are experienced with traditional website design and have some knowledge of SharePoint or ASP.NET master pages. It is also well suited for public Internet sites and highly styled internal employee portals. These types of highly customized efforts can take weeks or months.

Which option you choose is likely going to depend on the skill set of the people doing the work and the budget for the project. Throughout this book you see different examples about what is possible for each of the approaches.

SUMMARY

- *Branding* is the act of building a specific image or identity that people recognize in relation to your company or product. It applies to both traditional websites as well as SharePoint.
- The basic goal for branding SharePoint is to create a great user experience for anyone that visits the site.
- Every site created in SharePoint is focused on either communication or collaboration. The types of sites you have impact the approach to branding you take.
- SharePoint 2013 has new options that have changed the ways that many approach branding. Whether you are a new SharePoint user or a seasoned SharePoint branding veteran, anyone can brand SharePoint!