

# SHAREPOINT® 2013

BRANDING and USER INTERFACE DESIGN

Randy Drisgill

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# SharePoint® 2013 Branding and User Interface Design

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*Dedicated to waffles (thank you for staying delicious) and to Jackie (the love of my life) for always being there to eat them with me.*

—Randy Drisgill

*To my mom, thanks for always correcting my grammar.*

—John Ross

*To my daughter, Julia, the artistic one in the family.*

—Paul Stubbs

# About the Authors



**Randy Drisgill** has more than a decade of experience developing, designing, and implementing web technologies for clients ranging from small businesses to Fortune 500 companies. For the past 5 years, he has been working exclusively with SharePoint branding projects at SharePoint911, which was subsequently acquired by Rackspace in 2012. During this time, Randy has worked on more than 50 internal and public-facing SharePoint branding projects.

Randy is an active member of the SharePoint community, having contributed to several articles and books on the topic, as well as being the cofounder/comanager of the Orlando SharePoint User Group (OSPUG). In 2009, Randy was recognized by Microsoft as an authority on SharePoint branding by being awarded MVP status for SharePoint Server.

Randy lives in Orlando, Florida, with his wife. You can find Randy online on Twitter as @Drisgill or at his blog at <http://blog.drisgill.com>.



**John Ross** is a Senior Consultant with Rackspace and has more than eight years of experience implementing solutions for clients ranging from small businesses to Fortune 500 companies as well as government organizations. He has worked with all project phases from analysis to implementation and has been involved with a wide range of SharePoint solutions that include public-facing Internet sites, corporate intranets, and extranets.

John is an active member of the community and has presented at conferences all around the world. He is the cofounder/comanager of the Orlando SharePoint User Group (OSPUG). In 2009, John was awarded Microsoft's MVP award for SharePoint Server for his community contributions.

John lives in Orlando, Florida with his wife and two children. Visit his blog at <http://johnrossjr.wordpress.com> or follow his SharePoint adventures on Twitter @JohnRoss.



**Paul Stubbs** is a Microsoft Architect for Windows Azure focusing on cloud solution development and SharePoint. Previously, Paul worked with the SharePoint community developing SharePoint, Office, and Silverlight solutions and training. Paul has also worked as a Senior Program Manager on the Visual Studio team in Redmond, Washington. Paul is a Microsoft Certified Trainer (MCT) and has received Microsoft Certified Applications Developer (MCAD) and Microsoft Certified Solution Developer (MCSD) certifications. He has authored several books on solution development using Microsoft Office, SharePoint, and Silverlight, wrote several articles for MSDN Magazine, and has also spoken at many conferences such as Tech-Ed, Build, MIX, and the Professional Developers Conference (PDC) and Tech-Ready. Paul has a passion for new technologies and sharing those experiences with the community on his blog at <http://blogs.msdn.com/pstubbs>.

# About the Contributor

**Ryan Keller** has been working with SharePoint technologies since 2007, and he has worked as a SharePoint consultant since 2009 when he joined SharePoint911, a consulting company from Cincinnati, Ohio. In 2012, Rack-space Hosting acquired SharePoint911, and he is now part of the SharePoint team at Rackspace. He has helped write and edit material related to SharePoint 2010 for Microsoft, wrote as a contributing author to the popular *Professional SharePoint 2010 Administration*, and served as a technical editor for *Beginning SharePoint Designer 2010*, *Professional SharePoint 2010 Branding and User Interface Design*, and for this book, *Professional SharePoint 2013 Branding and User Interface Design*. He is also a contributing author on *Professional SharePoint 2013 Administration*. Since 2011, Ryan has focused his consulting efforts exclusively on SharePoint branding and has worked on projects ranging from simple designs to complex custom branding solutions. Ryan lives in Firestone, Colorado, with his wife Brittany and two kids, Kylie and Nathan.



# About the Technical Editors

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**Larry Riemann** has over 18 years of experience architecting and creating business applications for some of the world's largest companies. Larry is an independent consultant who owns Indigo Integrations and SharePoint Fanatics. He is an author, contributing author, and technical editor on three other SharePoint books and is an occasional speaker at conferences. For the last several years he has focused on SharePoint, creating and extending functionality where SharePoint leaves off. In addition to his expertise with SharePoint, Larry is an accomplished .Net Architect and has extensive expertise in systems integration, enterprise architecture, and high-availability solutions. You can contact Larry at [larry@spfanatics.com](mailto:larry@spfanatics.com).



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# Acknowledgments

Well, here we are again, a new version of SharePoint and a new branding book to go along with it. This is the third SharePoint branding book I've worked on, and every time I forget exactly how much work goes into putting these things together. With each new book there are, of course, new concepts to learn in a short amount of time, but new challenges also arise. For this book, the new challenge began when Jim Minatel from Wrox came to me with the crazy idea that we could produce a highly designed, full-color SharePoint branding book. The idea of making something that looks entirely different from any other SharePoint book on the market got me excited to jump back in to the writing process. There is absolutely no way this full-color book could be a reality without the help of many people that I need to thank.

First, I want to thank the author team for helping me put together the best collection of SharePoint 2013 branding knowledge that exists today. This includes my coworker, copresenter, and good friend, John Ross, as well as my buddy, Paul Stubbs, Sr. Architect at Microsoft. We also had assistance from my co-worker, Ryan Keller, who worked both as a contributing author and technical editor. Another big thanks goes out to Heather Waterman, who tech edited some of the more advanced branding chapters and went above the call of duty to make sure the book turned out awesome. Thanks to Larry Riemann and Mark Watts for tech editing chapters as well.

Along with the writing team, another obvious big thanks goes out to everyone at Wrox Press who helped us get this book to you. This includes Jim Minatel, Mary James, Victoria Swider, San Dee Phillips with Apostrophe Editing Services, Debbie Abshier, Lissa Auciello-Brogan, Kelly Henthorne, and probably several other people behind the scenes. They not only helped us sound intelligent, but also put together a really great-looking book. We also owe a great deal of thanks to our designer Ed Cross for creating the amazing look of the chapters and Erik Wieder for lending his photography skills to take that look even further. Special thanks to Jon Duckett for paving the way for a full-color technical book at Wiley.

I want to personally thank several folks from Microsoft without whom this book may have never seen the light of day. These people provided some of the best help and information that I have ever seen for a product that was still being developed. Primarily, this help came from the wonderfully talented Alyssa Levitz (SharePoint Program Manager at Microsoft), who never failed to find us the answers no matter how stupid the question may have seemed at the time, even if it meant answering a question over Facebook while she was on vacation! Topics like the Design Manager, composed looks, and the minimal download strategy would not have been described nearly as well without her help. Some of the other Microsoft folks that helped us understand SharePoint 2013 better include, in no particular order: Mark Kashman, Ethan Gur-esh, Kevin Gjerstad, Josh Stickler, Lionel Robinson, Jeremy Kelley, Jonathan Kern, Manfred Berry, Cindy Liao, Arye Gittelman, Petru Moldovanu, Tom Werner, Matt Evans, Reagan Templin, Nina Ruchirat, Stephen Howard, Kevin Davis (AWESOME), and anyone else I'm forgetting. These people all helped make SharePoint 2013 the best version of SharePoint ever.

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Lastly, I need to thank all my friends and family who put up with me working long hours throughout several months to put together this book. Most of them have no idea what I do for a living and will probably never read past this paragraph, but I couldn't have done it without all your friendship and support throughout the years. This includes my beautiful wife Jackie Drisgill, my parents Pat and Tom Drisgill, my in-laws Debbie and Dave Auerbach, my grandparents George and Mary Shea and Thomas and Elsie Drisgill, my friends Adam McCard and Marcela Errazquin, Jenn and Mark Clemons, John and

Vanessa Ross, Josh and Rachel Witter, and all my friends from Orlando, New York City, San Antonio, Boston, and throughout the SharePoint community; you know who you are!

The soundtrack for the writing of this book can be found at <http://drisgill.com/go/spotify-playlist>.

—Randy Drisgill

When we first learned that the next version of SharePoint was going to place a big focus on enhancing the design experience, and when Jim Minatel from Wiley presented the idea of doing a highly designed, full-color SharePoint book, it seemed like the stars were aligning. Bringing all of the new technical concepts together in a new format wouldn't have been possible without the help and support of many people.

I'd like to thank the rest of the author team; this book has your blood, sweat, and tears all over it. Big thanks to my good friend Randy Drisgill for being the driving force behind this book and dragging it across the finish line. It has been a wild and strange journey since our days back on the 8th floor to today. To Paul Stubbs, I appreciate all of your help and insight throughout the years. Big thanks to our coworker Ryan Keller for all his hard work as both a contributing author and technical editor.

To the technical editors, Heather Waterman and Larry Rieman, thanks once again for keeping us honest. This book is better because of your efforts. Thank you both!

With this release, I was completely blown away by the help and support from so many people at Microsoft; I hope we've done you proud. To Alyssa Levitz, I don't think anything written here in these acknowledgments could convey everything you've done to help make this book what it is. You're the best! There are so many others at Microsoft who have been generous with their time, including: Mark Kashman, Ethan Gur-esh, Josh Stickler, Lionel Robinson, Manfred Berry, Tom Werner, Reagan Templin, Nina Ruchirat, Stephen Howard, Kevin Davis, and I'm sure many others I've forgotten. It has been fun working with you all during this process. Let's do it again sometime!

Thanks to the team at Wrox Press for giving us the opportunity to write this book. Jim Minatel, Mary James, Victoria Swider, San Dee Phillips (Apostrophe Editing Services), Lissa Auciello-Brogan, Kelly Henthorne, and many others I'm sure. Thanks for taking a chance on doing something different with a SharePoint book and helping us make it the best it can be.

To everyone at Rackspace, I'm so proud to work with the best SharePoint team in the universe! Thanks to Shane Young, Jeff DeVerter, and Walt Leddy for the support and encouragement throughout the entire process.

Last but certainly not least, I'd like to say a special thank you to all of my friends and family. To my lovely wife Vanessa, thanks for putting up with all the late nights, long weekends, and my general crankiness that goes along with the writing process. To my kids, Ben and Julia, thanks for all the hugs and smiles! And to all the rest of my friends and family, unfortunately you'll be seeing and hearing from me more often now!

—John Ross

Thanks to Randy Drisgill and John Ross, my coauthors, for driving this book and for asking me to join them in writing it. Working with Randy and John has been a great experience for me, and I have learned a lot about the design space from them. I also really appreciate their vision for this book to be more than just another reference book, but a book that can not only teach you, but inspire you. I also want to thank our project editor, Victoria Swider, for her infinite patience and understanding as we tried to balance the writing of the book with our day jobs, family, and SharePoint schedule. And finally, I would like to thank Mary James, our Acquisitions Editor, for making this book possible and enabling us to realize our vision.

—Paul Stubbs

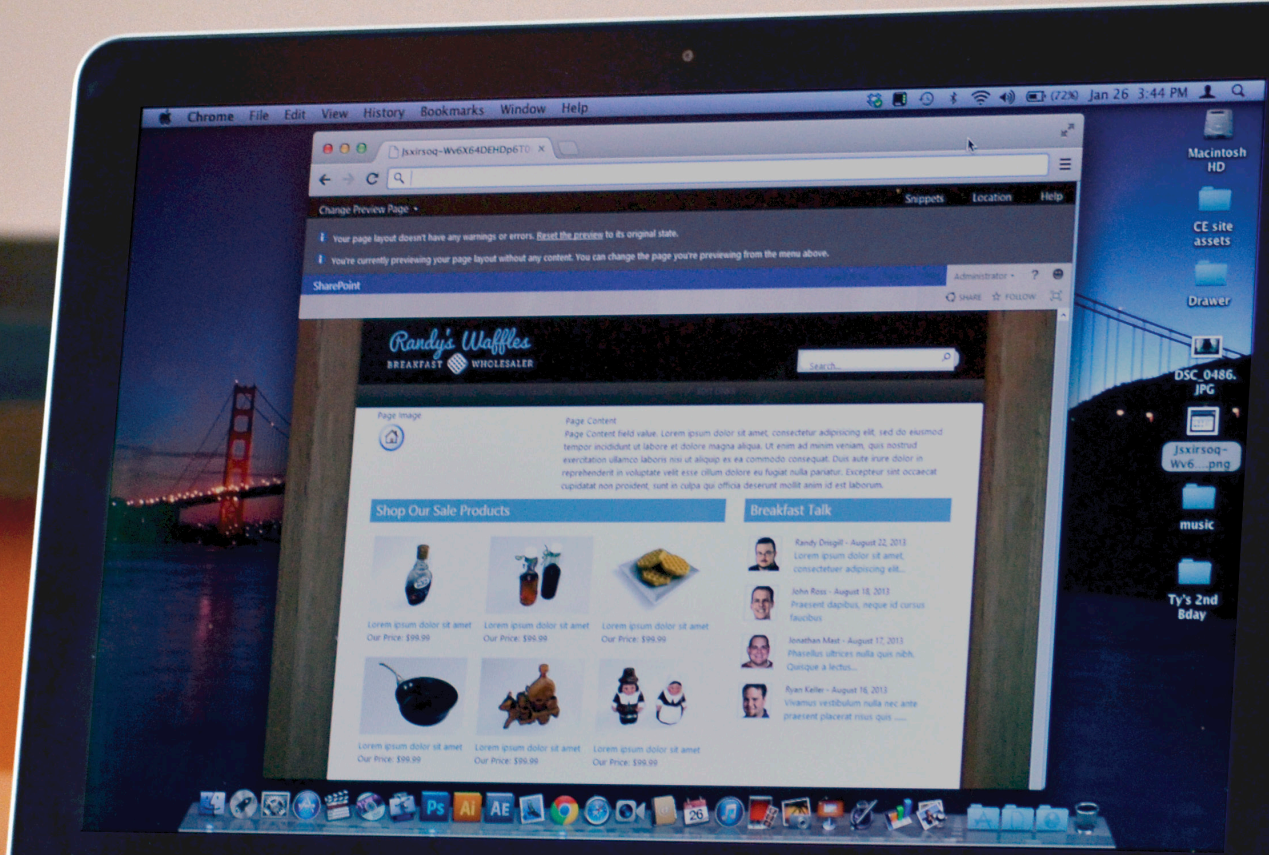


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Copy Review

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# Foreword

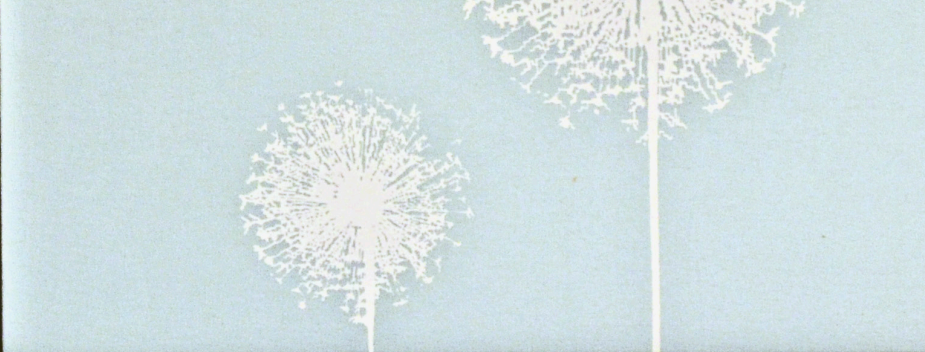
I joined Microsoft at a time when the development of SharePoint 2013 was well underway. My first week there, I was told that I owned the Design Manager and Device Channel user experiences, which you'll learn about in just a matter of pages. As quickly and thoroughly as possible, I had to ramp up on a set of features that would later be part of the keynote demos at SharePoint Conference 2012 in Las Vegas. My starting point was the previous version of this book, written for SharePoint 2010. But the world changed significantly between these releases, and the authors went along for that ride, becoming my friends along the way as we worked together to make designing websites on SharePoint a great experience all around.

SharePoint has a rich history as a document management tool, but branding was often an afterthought. Although it was possible to create beautiful SharePoint sites, it wasn't a familiar process for designers. It was with this in mind that we created a new way to approach design in SharePoint Server 2013. We didn't want you to have to make the trade-off between an easy, gorgeous design and a SharePoint site. Whether you're a small business owner who can't afford to hire a designer, or a large enterprise with the ability to hire an entire design team, SharePoint Server 2013 provides a number of site design capabilities to match every customer.

People with no previous SharePoint experience should be pleased with the revamped and reenergized theming experience that gives you access to a swath of full-blown composed looks, which you should think of as a restaurant meal with whatever substitutions you'd like! From one place, you can mix and match fonts, color palettes, layouts, and background images to your heart's content. If that's not enough, you can also build your own set of composed looks for your company, using the existing ones as a template. More advanced users are able to break down the wall between HTML mockups and SharePoint implementation; with a couple of button clicks, you can convert your HTML design into something SharePoint understands while continuing to work in whatever code editor you like best. You'll find a set of common HTML controls you'll use to hook up SharePoint functionality, as well as the ability to easily create mobile- or tablet-specific designs.

All these improvements amount to an experience where you are no longer working from scratch or having to worry too much about how SharePoint works. Instead, you get to focus on adjusting and improving your design to make full use of the features and power SharePoint offers, and I can't wait to see what you do with it. The authors of this book will help get you there. They've been exploring these tools since we could first let them. They know the ins and outs of branding in SharePoint as well as, if not better than, anyone. In this book, they'll share with you their tips and tricks so you can go forth and build great sites!

—Alyssa Levitz, SharePoint Program Manager, Microsoft Corporation





# Introduction

Thank you for picking up this book!  
We are truly experiencing an interesting step in the evolution of SharePoint. For the first time since SharePoint was invented, Microsoft is embracing the idea that creating beautiful and engaging SharePoint sites should be within reach of anyone from business users to developers, and of course, traditional web designers. With the creation of new features such as the Design Manager and composed looks, Microsoft has lowered the barriers to creating branding in SharePoint.

This book is intended to explain the beginner features but also to provide knowledge of the underlying SharePoint branding technology so that you can build a complete solution for branding your SharePoint site, whether it is an internal intranet site or a public-facing Internet site. Making the SharePoint user interface look good requires a designer that is comfortable with design theory and traditional web technologies, as well as having the ability to deal with topics traditionally handled by developers.

Not everyone who picks up this book is looking to become the next Picasso of SharePoint. For these readers, the first two sections of the book are dedicated to understanding just enough about SharePoint branding to plan, create, and apply custom designs to their sites. After you become comfortable with the basics of SharePoint branding, the second two sections of the book take you on a tour of creating custom SharePoint branding from scratch, providing the background knowledge needed to understand how the new, easy branding features work behind the scenes.

## HOW THIS BOOK IS ORGANIZED

The primary goal is to provide the best source of knowledge for SharePoint 2013 branding no matter what your specific skill level is. Although you can certainly use the book as a reference for specific topics, some of the examples throughout the book do build on each other. By the end of the book, you will have learned how to work with all the technology needed to create a fully branded SharePoint site.

The book is divided into four sections:

## The Basics

Introductory topics are explored, such as understanding what SharePoint branding means, understanding the basics of how SharePoint works behind the scenes, and an overview of how the SharePoint user interface can be used to edit the page-level branding.

## Planning a Design and Getting Started

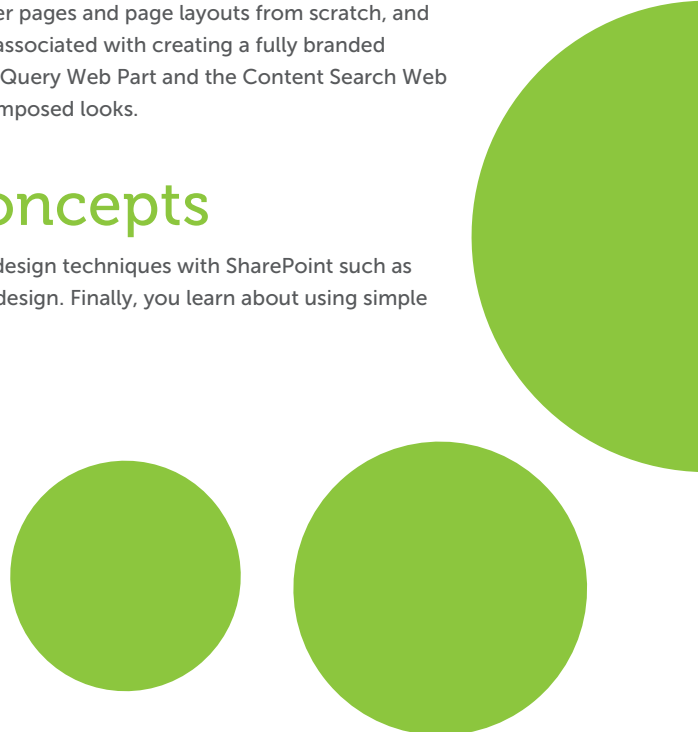
After explaining the basics, the book dives into planning for branding and starting a design in SharePoint. This section includes topics such as requirements gathering, wireframes, using the new SharePoint 2013 Design Manager and composed looks features, and a deep discussion on how CSS works in SharePoint.

## Advanced SharePoint Branding

The second half of the book goes into more intricate topics starting with advanced SharePoint branding. This includes a deep dive into creating master pages and page layouts from scratch, and a chapter that focuses on many of the common tasks associated with creating a fully branded SharePoint site. Rollup Web Parts such as the Content Query Web Part and the Content Search Web Part are covered as well as information on creating composed looks.

## Other Branding Concepts

The final section of the book discusses using modern design techniques with SharePoint such as HTML5, CSS3, jQuery, web fonts, and responsive web design. Finally, you learn about using simple online tools to create and style SharePoint apps.



# WHO SHOULD READ THIS BOOK

One of the most common SharePoint requests you might hear is to make a site “not look like SharePoint.” In most organizations this request might be made to someone who wears many hats but isn’t specifically a web designer. In other cases, the request might be made to a web designer or even a developer. To many of those users, SharePoint branding might simply mean that you want to change some colors and put your company header at the top of the page, whereas other users want to create a highly branded corporate intranet portal with a cutting-edge design.

This book is intended for a wide range of readers and skill levels. There is a basic assumption that you have some understanding of how modern websites are created. This includes knowledge of HTML, CSS, and some understanding of the creative design process.

## TOOLS YOU NEED

Having a SharePoint 2013 installation available to follow along with the examples can definitely make a big difference when you read this book. If you don’t have access to a dedicated SharePoint 2013 server, you can install SharePoint 2013 on a virtual machine to try it out locally, or you can look into cloud-based options such as Office 365’s SharePoint Online.

You will also want to have a code-editing tool such as either Visual Studio, Adobe Dreamweaver, Expression Web (recently discontinued, but a free download), or even the free Notepad++. Along with these, you may also need to have some traditional web design programs, such as Adobe Photoshop or Microsoft Expression Design (also discontinued and free). The following list can get you started with software for following along with the book:

- **SharePoint 2013 Download:** <http://technet.microsoft.com/en-us/evalcenter/hh973397.aspx>
- **Install and Configure SharePoint 2013:** <http://technet.microsoft.com/en-us/library/cc262957.aspx>
- **Office 365 Trial:** <http://www.microsoft.com/en-us/office365>
- **Visual Studio 2012:** <http://www.microsoft.com/visualstudio/eng/downloads>
- **Adobe Photoshop:** <http://www.adobe.com/products/photoshop.html>
- **Adobe Dreamweaver:** <http://www.adobe.com/products/dreamweaver.html>
- **Notepad++:** <http://notepad-plus-plus.org/>
- **Microsoft Expression Web and Design:** <http://www.microsoft.com/expression/>

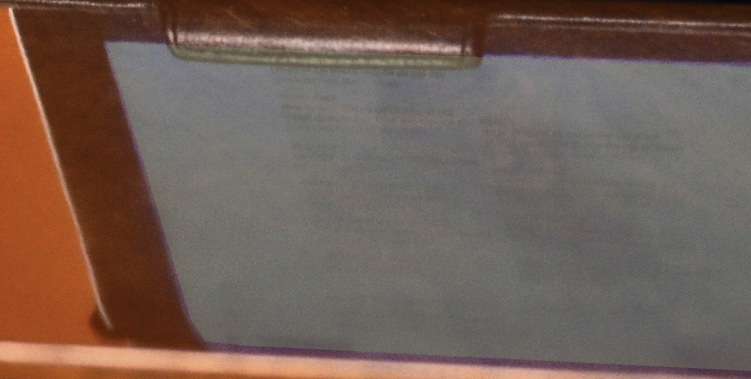


# WHAT'S ON THE WEBSITE

As you work through the examples in this book, you may choose either to type in all the code manually or to use the source code files that accompany the book. All the source code used in this book is available for download at <http://www.wrox.com>. When at the site, simply locate the book's title (either by using the Search box or by using one of the title lists) and click the **Download Code** link on the book's detail page to obtain all the source code for the book.

## THE ROAD AHEAD

As you start to learn about branding a SharePoint site, it's not uncommon to get frustrated. Designing for SharePoint is different than designing for your own website. It involves overriding and adjusting a design to fit within someone else's code base, in this case Microsoft's out-of-the-box SharePoint code. But don't get discouraged; with a little patience and the appropriate help, you can apply branding to SharePoint. This book aims to provide you with all the knowledge and techniques required to bridge this gap.





# 1

## 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.

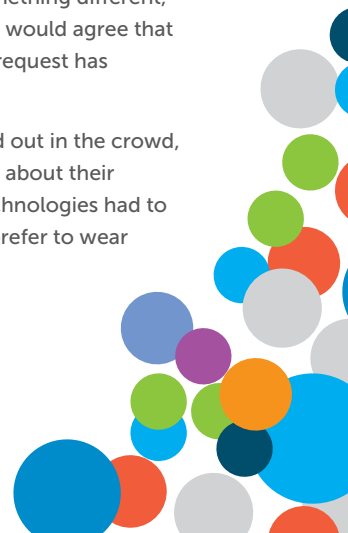
As mentioned earlier, branding is a marketing term that has been also applied to SharePoint to refer to changing the look and feel of something. In a more complete sense, SharePoint branding is also often referred to as User Experience (UX) development. That term implies a deeper meaning than aesthetics 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.

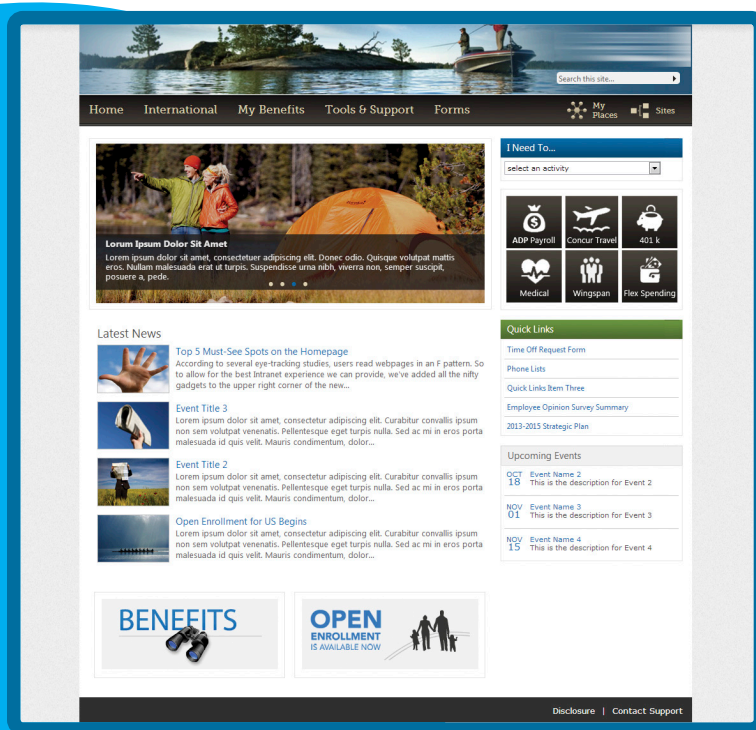
Considering who uses the site and how they are supposed to use it should be key in creating the design for your site. There's a distinct difference in the intended purpose of a site designed purely for communicating information in a one-way fashion versus a collaboration site designed for a two-way flow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

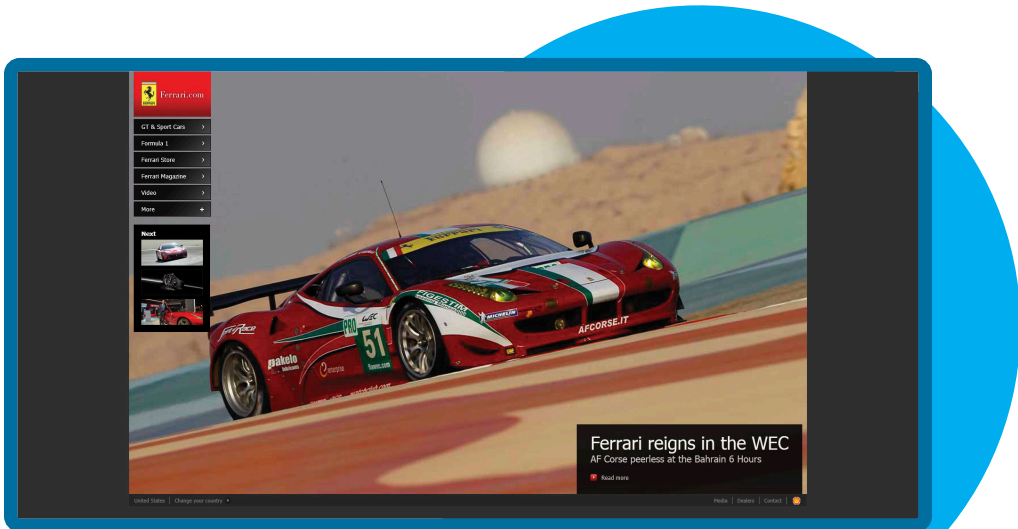


# Internet Sites

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!

# 2

## SHAREPOINT OVERVIEW

