

BRANDING SHAREPOINT

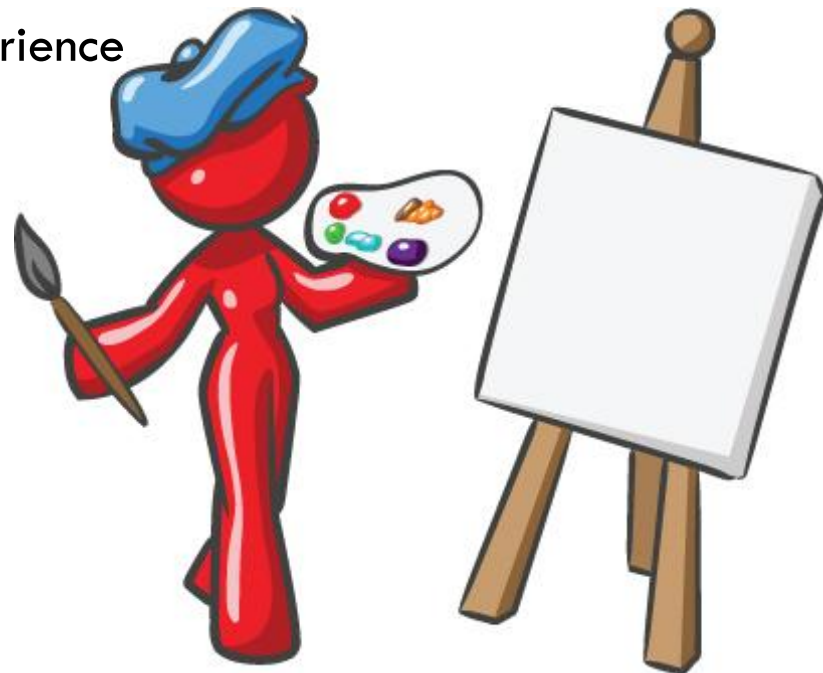


Cathy Dew – CTS, Inc.

Who Am I?

□ **Cathy Dew**

- Graphic Designer and Consultant, CTS
- MCTS Certified
- Based out of Birmingham, Alabama
- 3 years of SharePoint branding experience
- President and Founder of the
Birmingham SharePoint Users Group
- Trainer in SharePoint
for New Horizons Learning Center
- [catpaint1](#) on Twitter



CTS, Inc. Company Overview

- ❑ Technology based Professional Services Firm established in 1993
- ❑ Offices in Birmingham, AL, Atlanta, GA & Mobile, AL
- ❑ 130+ employees
- ❑ 210+ clients
- ❑ 5+ years of SharePoint® experience
- ❑ 45 SharePoint® Projects
- ❑ 14 MOSS Certified Consultants



What is Branding?

Why does it matter to me? Why should it matter to me?

What is Branding?

- Branding:
 - ▣ The act of building a specific image or identity that people recognize in relation to your company
- Website Branding:
 - ▣ The colors, fonts, logos, and supporting graphics that make up the general look and feel of a corporate website.
- Branding for SharePoint
 - ▣ Master Pages, Page Layouts, CSS, Web Parts, XSLT, images, etc.

Why Branding?

- Delivers your message clearly
- Confirms your credibility
- Connects your target prospects emotionally
- Motivates the buyer
- Cements user loyalty



Before Branding

What do you need to know before you start the actual Branding?

Where do I start?

- SharePoint branding can affect and incorporate several areas within SharePoint. It is helpful to have a general understanding of all the components before taking a deep dive into any one element.



The basics

- Content – Knowing the types of content on your site will help you to plan your taxonomy
- Content Types
- Lists and Libraries – These are the containers for your content
- Web Parts – Think of these as moveable content for your site. A good way to present the content to your users

Taxonomy

Taxonomy: the science or technique of classification; the division into ordered groups or categories

Taxonomy and SharePoint

- Taxonomy Structure:
 - ▣ Used to categorize information
 - ▣ Essential part of the content management system
- Taxonomy View: (used more in branding)
 - ▣ Less about structure and more about usability
 - ▣ An interface to access content in the taxonomy structure

Taxonomy and SharePoint

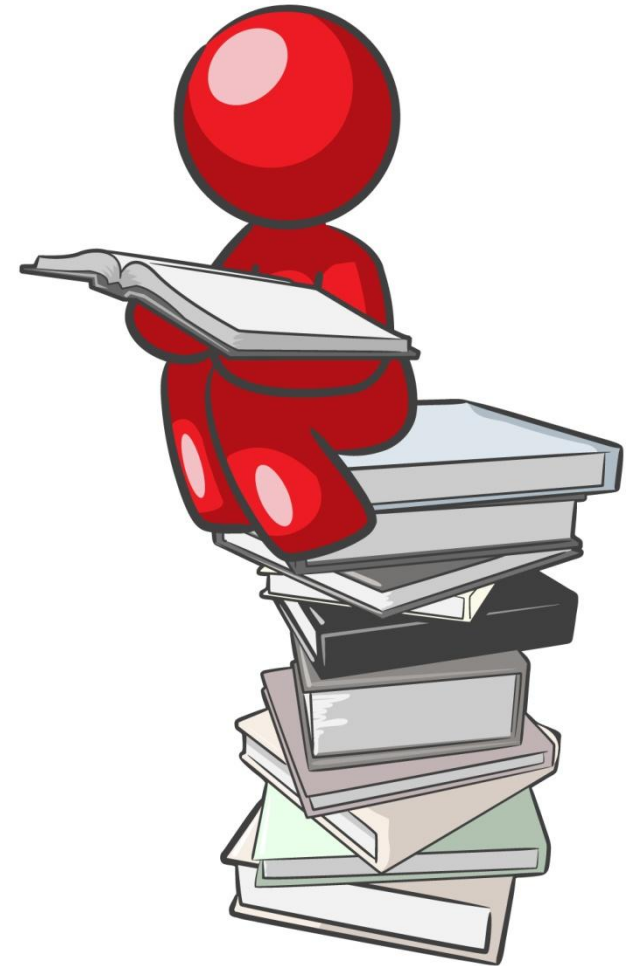
- While Branding SharePoint sites, you will likely interface with taxonomy structure, but focus on the taxonomy view.

Taxonomy and Branding

- Each of the following pieces can be a branded part of the user interface:
 - Page Layouts
 - Site and Sub Site Design
 - Navigation
 - WSS Sites
 - Blogs
 - Wikis
 - Extranets

What about branding will I know from this plan?

- Features to Use
- Custom Development needs
- Content Types created for common content need an interface.
 - ▣ Here is where page layouts & content pages come in.
- Audience needs drive page content.



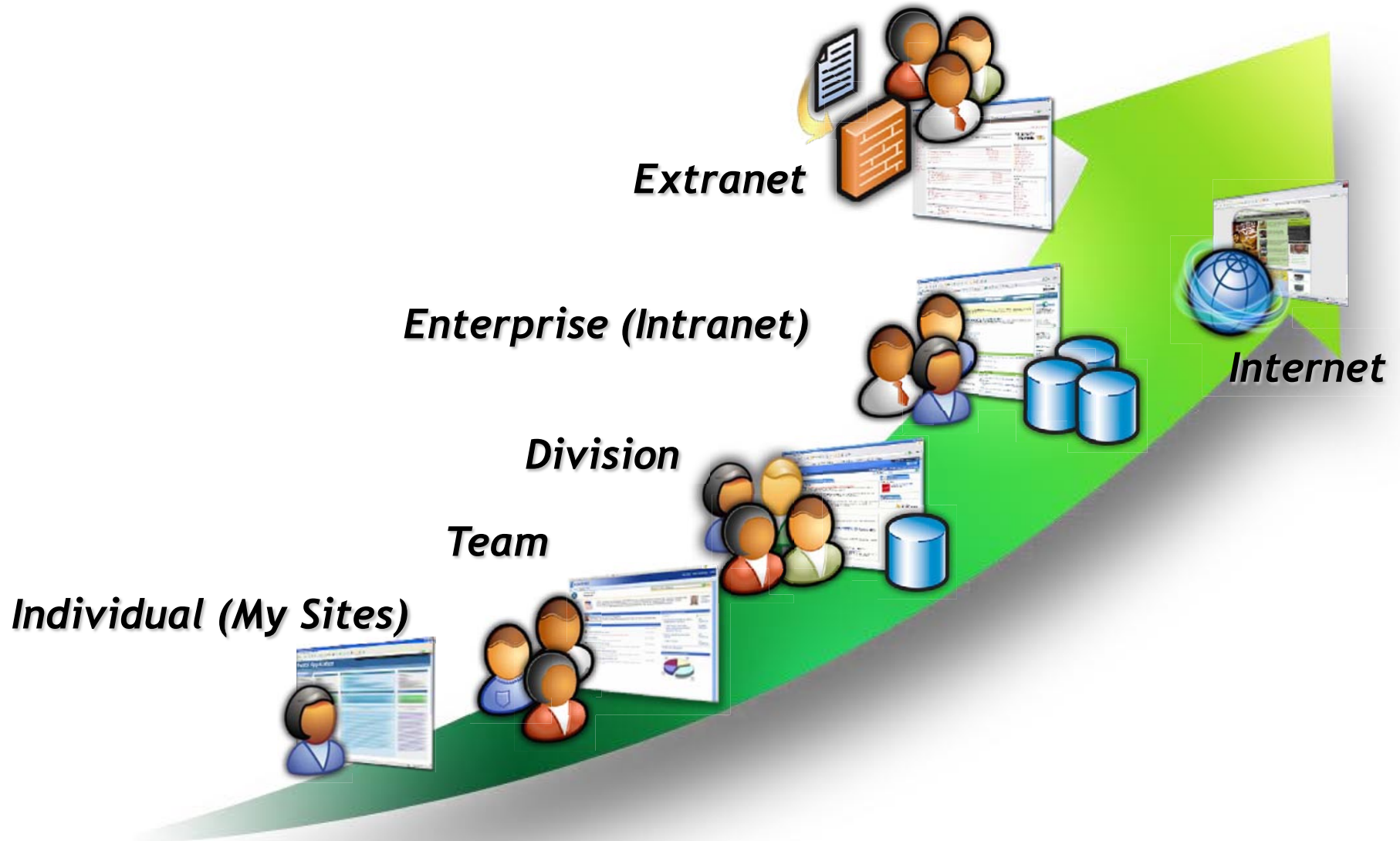


Designing for SharePoint Sites

SharePoint is a Web Application

- This is an important fact to remember. At the end of the day, SharePoint is a web application.
- The design needs for SharePoint can seem never-ending so a plan will help you deal with these issues.

Types of SharePoint Sites



Site Requirements that Affect Design

- Page layout and Content Design
 - ▣ Will your site have a splash page? A different homepage? Will your subpages look the same or different?
- Navigation
 - ▣ OOTB navigation or custom navigation or a combination of the 2?

SharePoint Design Gotchas

- Fluid vs. Fixed Width
 - ▣ Not a huge problem for Internet sites, a problem with Intranet sites using lists and libraries
- Rounded Corners and different backgrounds for Web Parts
 - ▣ There are workarounds for each of these, but they involve more time in making them work and cross browser compatible

SharePoint Design Gotchas

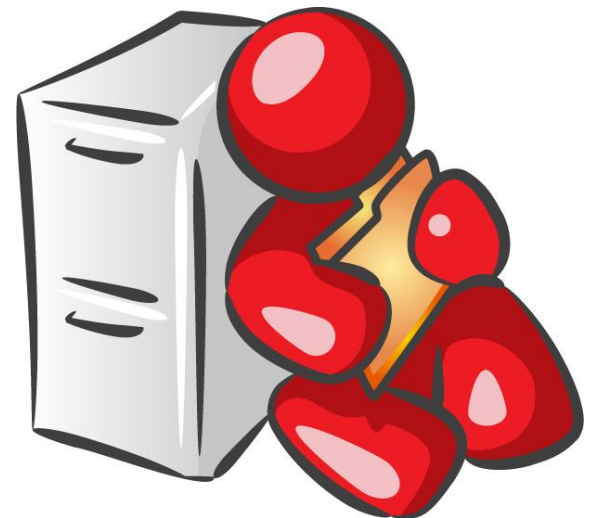
- Text in dynamic navigation
 - ▣ No images of buttons in navigation if using OOTB navigation
- Font Faces used across the site
 - ▣ The fonts are all over the place in the 20,000+ lines of CSS code that controls SharePoint. If you want to change the font, allocate extra time to make this happen
- The EM font size
 - ▣ SharePoint doesn't like this, so best practice is to not use it.

Branding 101

Okay, I think I am ready to start branding a SharePoint Site. What is involved?

Where Does MOSS Store Items?

- Things are stored in one of 2 locations
 - ▣ The content database
 - ▣ The web server – 12 Hive
- Why does this matter?
 - ▣ Knowing where images and different things are stored will allow you to work more efficiently in MOSS



How does MOSS Work - Layers

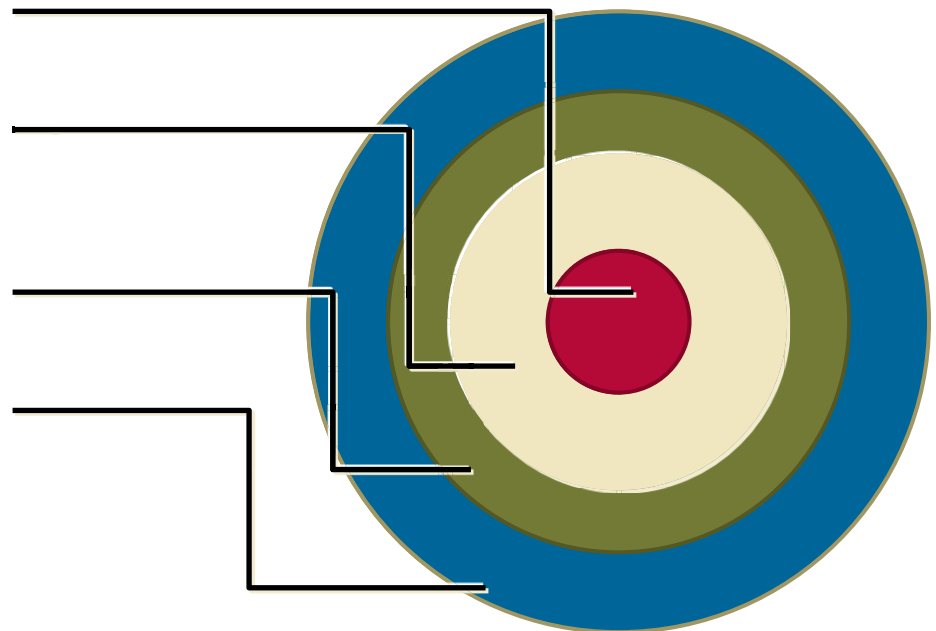
- SharePoint is like an onion and has many layers.
- Each layer is self-containing, accessible and editable.

Content (stored in the content database)

Functionality (web parts, Features)

Content Design Layer

Site Design Layer: site map, planning, and architecture of site.



What tools does SharePoint provide for branding?

- Central storage of your site design.
 - ▣ One file that controls the layout and design for numerous sites and web pages.

MASTER PAGES and THEMES

- Templates that control content design.
 - ▣ Users select a template when creating new content (publishing sites only).
 - ▣ The template controls placement of site data.

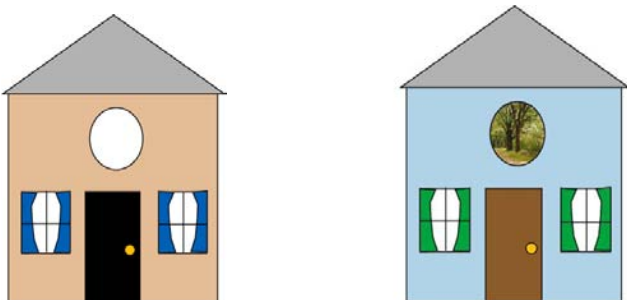
PAGE LAYOUTS and CONTENT PAGES

Theme vs. Master Page

□ Theme

- ▣ Change the CSS properties for the site
- ▣ Swap out the images for the site
- ▣ Packages up the CSS and Images and is used for deployment
- ▣ Stored on the web server

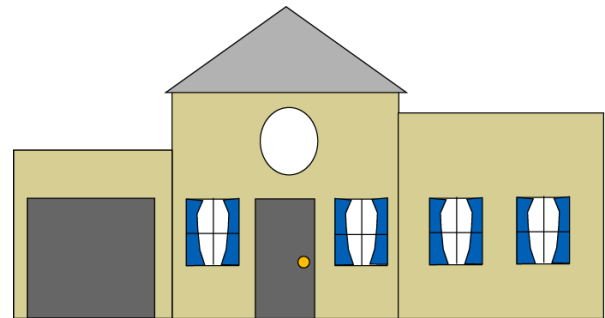
Akin to painting a house new colors and changing the pictures on the walls



□ Master Page

- ▣ Complete control over the site design – move, hide or add elements
- ▣ Link to a CSS file to add and change CSS properties
- ▣ Can reference new images
- ▣ Stored on the web server or content database
- ▣ Works with content pages to create the rendered site.

Akin to remodeling the whole house



Changing a Theme

The screenshot displays a SharePoint site with a dark blue header. The top left corner shows "Home" and the top right corner shows "Welcome Bob McFarlane" with a user profile icon. The main header features the "LANSTON COLLEGE" logo on the left and a search bar with "All Sites" selected and "Advanced Search" on the right. Below the header is a navigation menu with "Home", "Departments", "Admin & Services", "Chancellor", and "Resources". The "Site Actions" menu is visible in the top right.

The main content area is titled "Home > Departments". It contains two paragraphs of placeholder text:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec semper, urna sed viverra lacinia, magna nibh placerat justo, sed condimentum id nulla. Maecenas pulvinar facilisis elit. Aenean pulvinar ante sit amet nulla. Duis nunc. Proin orci sem, ultricies id, bibendum vitae, dictum a, mi. Sed condimentum, diam eget pharetra euismod, nunc purus egestas orci, sed consequat justo justo vel diam. Donec pharetra orci eget arcu. Phasellus Donec semper leo id tortor. Aliquam eleifend viverra nunc.

Nullam a est laoreet nulla semper porta. Nam pretium aliquet urna. Aenean sit amet urna id turpis posuere dapibus. Ut vel lorem. Integer neque hendrerit non, faucibus vitae, lobortis a, dolor. Maecenas sed mauris. Sed consequat vestibulum eros. Vivamus nisl purus, cursus eget, aliquam id, tortor. Integer quis erat. Aliquam erat volutpat.

On the left side, there is a "Recycle Bin" icon and a list of navigation items:

- View All Site Content
- Nav Header
- Nav Item
- Nav Item
- Nav Item
- Nav Header
- Nav Item
- Nav Item
- Nav Item

The "Documents" section shows a table with the following data:

Type	Name	Modified By
Folder	Content	SOLOMON-WIN2003\Administrator
Folder	Sample Folder	SOLOMON-WIN2003\Administrator
Folder	Library Folder	SOLOMON-WIN2003\Administrator

Below the table is a link: "Add new document".

The "Links for You" section is expanded, showing a list of links:

- Sample Summary Link
- Demo Site
- Content Link
- Another Sample

Changing a Master Page

The screenshot displays the Lanston College website interface. At the top, a navigation bar includes links for "Our Directory", "A - Z Index", "Contact Us", and "Login". Below this is a large banner image of a beach with the text "learn grow experience". A search bar is located on the right side of the banner.

Left Navigation Menu:

- Apply & Enroll
- Academic Programs
- For Students
- Lanston Online
- Campus Resources
- About Lanston College
- Alumni & Partners

Main Content Area:

This Week at Lanston College

- 6/18 Lanston Review: Celebrating 20 Years**
Join Bob McFarlane, editor of Lanston's widely praised literary journal Lanston Review, for the 20th anniversary celebration, featuring readings by founder Judy Medlin...
[Keep Reading](#)
- 6/20 Raising Readers: A Children's Literacy Festival**
Preschoolers and youngsters in grades K-3 are invited to explore the joys of reading and communication at an exciting festival filled with sing-alongs, interactive storytelling...
[Keep Reading](#)

Upcoming Events

- 6/26 Club Row**
Lanston's student clubs join together to celebrate community service and make new friends...
[Keep Reading](#)
- 7/2 Seventh Annual Emily Young Lecture**
Don't miss this annual lecture established in honor of former Lanston Vice President and current HT Community College District...
[Keep Reading](#)
- 7/24 Asian/Pacific Islander Celebration**
Back by popular demand! Come celebrate Asian/Pacific Islander Month at our eighth annual Asian/Pacific Islander Celebration...
[Keep Reading](#)

Right Side Content:

- Search:** [Search Bar]
- Class Schedules & Links**
 - » Summer 2008 Schedule of Classes
 - » Fall 2008 Schedule of Classes
 - » Current Class Listings
 - » Online Classes
 - » Dates and Deadlines
 - » **ENROLL NOW**
- Quick Links**
 - » Campus Map
 - » Parking/Shuttle/Transit Info
 - » Request to Extend Shuttle Use
 - » Faculty
- For New Students**
 - » New Student Application
 - » Enrollment Services
 - » Lanston Welcome Center

Bottom Left Section:

“There's never an end to your education, and Lanston is a great place to find new focus. It's all put right there in front of you.”

Mary Dithe

[Learn more about Mary](#)

How are SharePoint Pages Assembled?

Site Design

*Design wrapper –
Design elements you
want on every page*
Master Pages, Themes, CSS



Content Design

Provides and formats the content on the page
Page Layouts, Content Pages

Functionality

Displays the content
Web Parts, Field Controls

Content

Stored in the Content
Database

Content Control
ID=MainContent

Content Control
ID=RightColumn

=

Rendered Page

Header		
Nav	Main Content	Right Column
	Footer	

Design Requirements

- What needs to be created?
 - ▣ Do you have a home page design and a sub page design? Or just one design for all pages?
 - ▣ Do you have color schemes for various content areas?
 - ▣ Will you use rollups on your key entry pages to provide the latest info? How will that get formatted?
- Map out the development needed.
 - ▣ Master pages, themes
 - ▣ Page layouts
 - ▣ Custom XSL for CQWP or custom DVWP

Evaluate SharePoint Components

- Start by looking at default.master (used in the Collaboration template and WSS sites).
 - ▣ Shows all of the SharePoint components.
 - ▣ Decide what you want to use in your design.

The screenshot displays the SharePoint 2007 interface for a site named 'MOSS1'. Several components are highlighted with red boxes:

- MOSS1** (site name)
- Welcome SCIMOSSVM\Administrator** (user information)
- My Site** and **My Links** (navigation links)
- All Sites** (dropdown menu)
- Advanced Search** (search button)
- MOSS1** (site name in navigation bar)
- Document Center**, **News**, **Reports**, and **Search** (navigation tabs)
- View All Site Content** (link in left sidebar)
- MOSS1** (site name in left sidebar)
- Document Center**, **Lists**, **News**, **Reports**, **Search**, and **Sites** (left sidebar menu)
- MOSS1** (site name in main content area)
- Welcome to Microsoft® Office SharePoint® Server 2007** (main heading)
- Get started with the new version of Microsoft Office SharePoint Server 2007:** (introductory text)
- Site and Content Management** (section heading) with tasks:
 - Create new pages, sites, and lists
 - Add users to "Members" group to edit pages
 - Create a personal site by clicking "My Site"
 - Search over sites,
- Business Solutions (requires Enterprise License)** (section heading) with tasks:
 - Create key performance indicators and reports
 - View an Excel workbook through the Excel Web Access Web Part
 - Deploy an InfoPath form to a Document Library
- I need to...** (dropdown menu) with **Choose task** (input field) and a green arrow button.
- Employee Lookup** (dropdown menu) with an input field and a search icon.
- Top Sites** (dropdown menu)

Evaluate your design

- SharePoint works largely off generated content. Each instance of content uses the same code for the user interface. Does your design cater to this?

The screenshot shows a SharePoint interface with several annotations. At the top, a horizontal line is labeled "Current News". Below it, the text "Lorem ipsum dolor sit amet" is displayed. A blue bar contains two dropdown menus: "Documents" on the left and "Summary Link Web Part" on the right. The "Documents" dropdown is open, showing a table with columns "Type", "Name", and "Modified By". The "Summary Link Web Part" dropdown is also open, showing a list of items: "Sample Summary Link", "Demo Site", "Content Link", and "Another Sample". Below the dropdowns, there is a section of text: "Quisque sit amet odio. Suspendisse potenti. Nunc fringilla nisl a erat. Vestibulum adipiscing nonummy quam. Suspendisse consectetur. [more]". Arrows point from the "Current News" label to the text above, from the "Documents" dropdown to the table, from the "Summary Link Web Part" dropdown to the list of items, and from the "[more]" link to the text below.

Type	Name	Modified By
Content		SOLOMON-WIN2003\Administrator
Sample Folder		SOLOMON-WIN2003\Administrator
Library Folder		SOLOMON-WIN2003\Administrator

Quisque sit amet odio. Suspendisse potenti. Nunc fringilla nisl a erat. Vestibulum adipiscing nonummy quam. Suspendisse consectetur. [\[more\]](#)

Skills for Development

- Building branding for SharePoint is similar to building branding for any .NET web application or like building a web site.
 - ▣ HTML
 - ▣ CSS
 - ▣ User controls
- Slice n' dice your design and create code for design elements.
 - ▣ Incorporate the SharePoint Content Placeholders
 - ▣ Incorporate the SharePoint user controls

CSS for SharePoint

How do I deal with over 20,000 lines of CSS?

Where is CSS Stored in SharePoint?

- Now that you know the basic concepts, how does SharePoint work with CSS?
- The 26 OOTB style sheets are stored either on the web server or in the content database.
 - ▣ Web Server location:
 - `\12\TEMPLATE\LAYOUTS\1033\STYLES`
 - ▣ Content Database location:
 - `http://site.com/Style Library/en-us/Core Styles`



Where do I store my CSS sheets?

- You can store your sheets in either location as well.
- Best Practices dictates that you store your custom CSS sheets in new directories under the default location

How does SharePoint reference styles?

- How does SharePoint call styles?
 - ▣ Default styles are always called first
 - ▣ Alternate CSS styles in the site settings are called second
 - ▣ Styles included in the page layout are also called second
 - ▣ Any styles referenced correctly in the master page code are referenced last
- Best Practice note: reference your custom style sheets in the master page to make sure they are called last.

Best Practices for creating your own CSS sheets in SharePoint

- **YOU SHOULD NEVER EDIT THE CORE.CSS FILE!!!!**
 - ▣ You don't do this for several reasons primarily:
 - Patches and Upgrades might overwrite the changes you have made to the OOTB files (they won't affect your custom files)
 - Organization and Sanity: For easier maintenance if you keep your files separate you will be able to edit and modify easier.
- **Store your styles in a single file**
 - ▣ If you note out your styles it will be easier to maintain your custom CSS if you have put all of your customizations in one file.



SharePoint Themes

Things to know about Themes

- ❑ Themes are custom designs that can be saved and applied to a SharePoint Site.
- ❑ Site Layout stays the same, a theme doesn't affect this.
- ❑ Applying themes affects only the current site and any new pages for that site.
- ❑ Themes are stored on the web server



Why to Use Themes

- Themes do not create design, but they do package up images and CSS
- Themes apply not only to the content and to the list/library pages of a site, but also the pages in the `_layouts` directory
- Can be used in conjunction with Master pages, site definitions and site templates

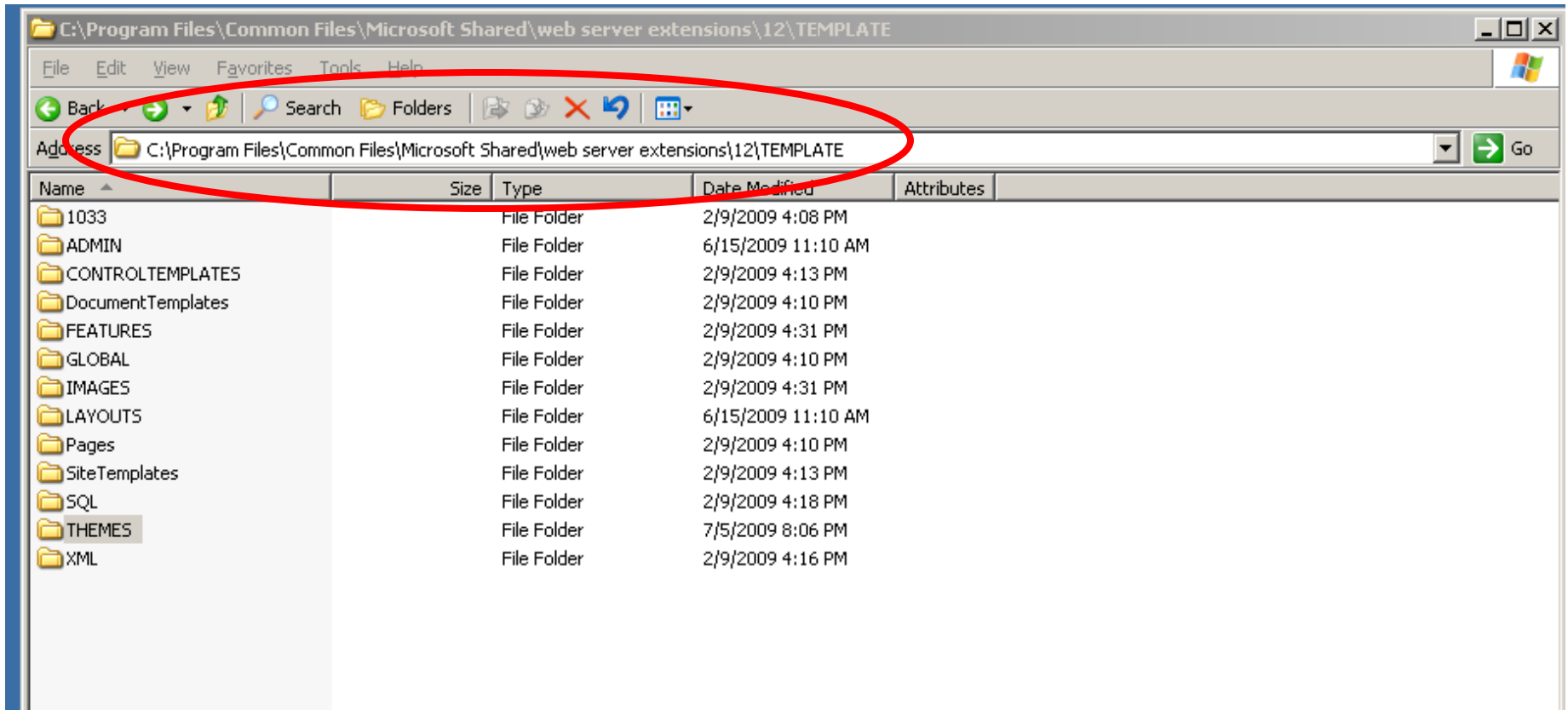
Drawbacks to Themes

- ❑ Themes are stored on the Web Server
- ❑ Editing a theme involves making changes and copying them to the Web Server
- ❑ Editing a theme also involves reapplying the theme to each site that uses it.
- ❑ Controlling the themes available involves editing the SPTHEMES.XML file on the Web Server.

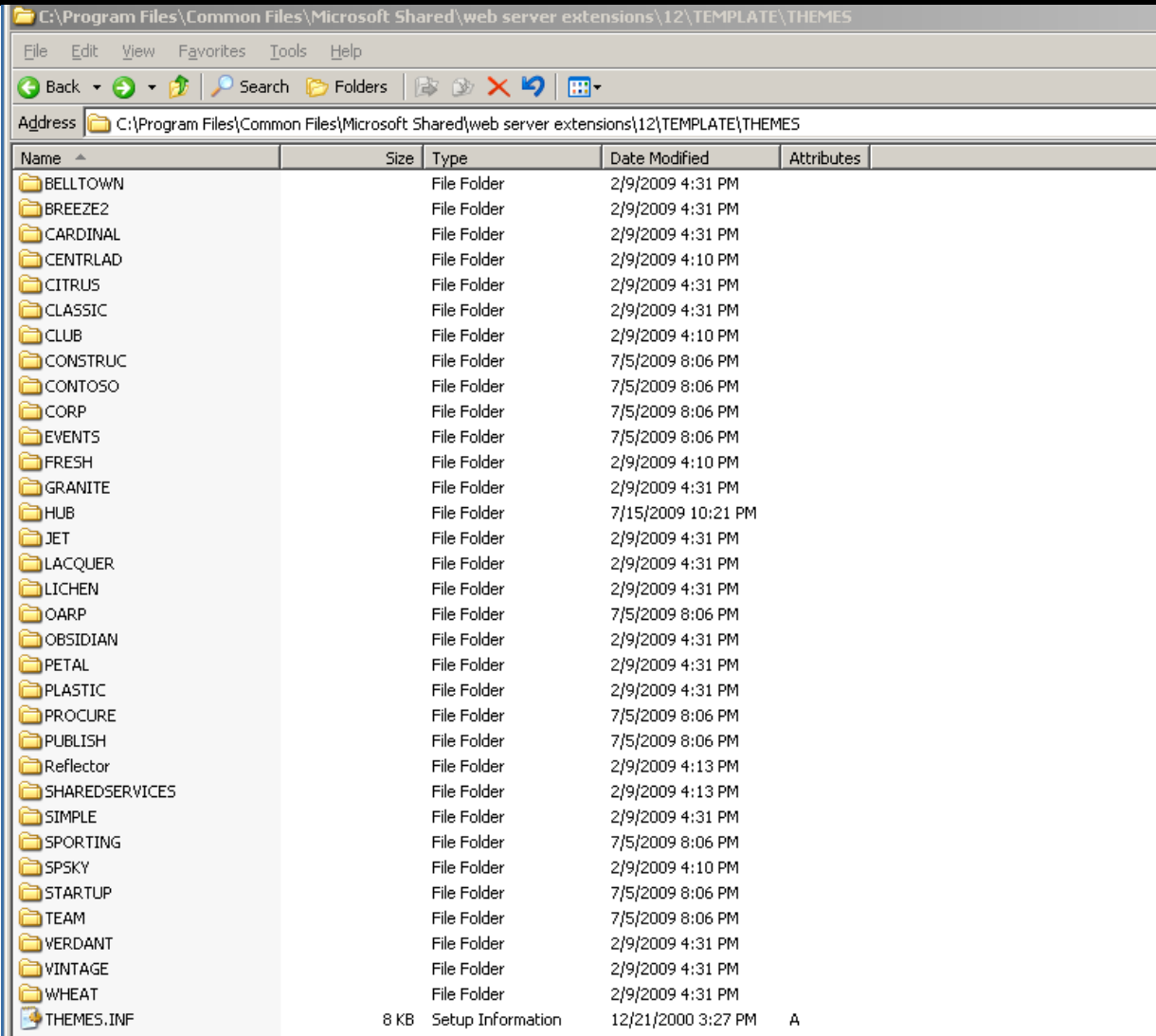
Creating Themes

How to create a Custom Theme

Where are themes stored?



Themes Folder

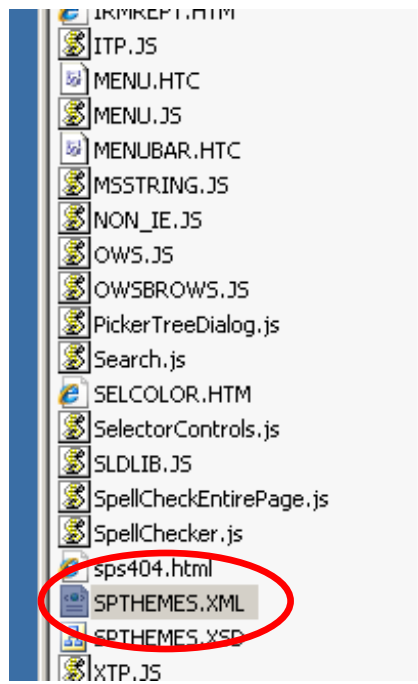


The screenshot shows a Windows Explorer window with the address bar set to `C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\THEMES`. The window displays a list of folders and one file. The folders are: BELLTOWN, BREEZE2, CARDINAL, CENTRLAD, CITRUS, CLASSIC, CLUB, CONSTRUC, CONTOSO, CORP, EVENTS, FRESH, GRANITE, HUB, JET, LACQUER, LICHEN, OARP, OBSIDIAN, PETAL, PLASTIC, PROCURE, PUBLISH, Reflector, SHARED SERVICES, SIMPLE, SPORTING, SPSKY, STARTUP, TEAM, VERDANT, VINTAGE, and WHEAT. The file THEMES.INF is listed at the bottom with a size of 8 KB, type of Setup Information, and a date modified of 12/21/2000 3:27 PM.

Name	Size	Type	Date Modified	Attributes
BELLTOWN		File Folder	2/9/2009 4:31 PM	
BREEZE2		File Folder	2/9/2009 4:31 PM	
CARDINAL		File Folder	2/9/2009 4:31 PM	
CENTRLAD		File Folder	2/9/2009 4:10 PM	
CITRUS		File Folder	2/9/2009 4:31 PM	
CLASSIC		File Folder	2/9/2009 4:31 PM	
CLUB		File Folder	2/9/2009 4:10 PM	
CONSTRUC		File Folder	7/5/2009 8:06 PM	
CONTOSO		File Folder	7/5/2009 8:06 PM	
CORP		File Folder	7/5/2009 8:06 PM	
EVENTS		File Folder	7/5/2009 8:06 PM	
FRESH		File Folder	2/9/2009 4:10 PM	
GRANITE		File Folder	2/9/2009 4:31 PM	
HUB		File Folder	7/15/2009 10:21 PM	
JET		File Folder	2/9/2009 4:31 PM	
LACQUER		File Folder	2/9/2009 4:31 PM	
LICHEN		File Folder	2/9/2009 4:31 PM	
OARP		File Folder	7/5/2009 8:06 PM	
OBSIDIAN		File Folder	2/9/2009 4:31 PM	
PETAL		File Folder	2/9/2009 4:31 PM	
PLASTIC		File Folder	2/9/2009 4:31 PM	
PROCURE		File Folder	7/5/2009 8:06 PM	
PUBLISH		File Folder	7/5/2009 8:06 PM	
Reflector		File Folder	2/9/2009 4:13 PM	
SHARED SERVICES		File Folder	2/9/2009 4:13 PM	
SIMPLE		File Folder	2/9/2009 4:31 PM	
SPORTING		File Folder	7/5/2009 8:06 PM	
SPSKY		File Folder	2/9/2009 4:10 PM	
STARTUP		File Folder	7/5/2009 8:06 PM	
TEAM		File Folder	7/5/2009 8:06 PM	
VERDANT		File Folder	2/9/2009 4:31 PM	
VINTAGE		File Folder	2/9/2009 4:31 PM	
WHEAT		File Folder	2/9/2009 4:31 PM	
THEMES.INF	8 KB	Setup Information	12/21/2000 3:27 PM	A

Themes XML File

C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\LAYOUTS\1033



IRMPKPT.PT.M	0 KB	HTML Document	11/8/2006 7:16 PM	A
ITP.JS	15 KB	JScript Script File	11/8/2006 7:18 PM	A
MENU.HTC	22 KB	HTC File	11/8/2006 7:16 PM	A
MENU.JS	64 KB	JScript Script File	11/8/2006 7:16 PM	A
MENUBAR.HTC	14 KB	HTC File	11/8/2006 7:16 PM	A
MSSTRING.JS	4 KB	JScript Script File	11/8/2006 7:17 PM	A
NON_IE.JS	66 KB	JScript Script File	11/8/2006 7:17 PM	A
OWS.JS	209 KB	JScript Script File	2/11/2008 10:58 PM	A
OWSBROWS.JS	3 KB	JScript Script File	11/8/2006 7:16 PM	A
PickerTreeDialog.js	3 KB	JScript Script File	1/23/2008 7:31 AM	A
Search.js	26 KB	JScript Script File	10/28/2006 11:13 AM	A
SELCOLOR.HTM	12 KB	HTML Document	11/8/2006 7:16 PM	A
SelectorControls.js	15 KB	JScript Script File	10/26/2006 8:15 PM	A
SLDLIB.JS	29 KB	JScript Script File	10/26/2006 8:40 PM	A
SpellCheckEntirePage.js	6 KB	JScript Script File	10/26/2006 8:15 PM	A
SpellChecker.js	37 KB	JScript Script File	10/8/2008 7:28 AM	A
sps404.html	1 KB	HTML Document	10/26/2006 9:08 PM	A
SPTHEMES.XML	9 KB	XML Document	7/5/2009 8:06 PM	A
SPTHEMES.XSD	2 KB	XML Schema File	10/17/2003 12:51 AM	A
XTP.JS	2 KB	JScript Script File	11/8/2006 7:18 PM	A

Themes XML File

```
</Templates>  
<Templates>  
  <TemplateID>TEAM</TemplateID>  
  <DisplayName>Team Site Theme</DisplayName>  
  <Description>A Team-like Site Theme</Description>  
  <Thumbnail>1033/IMAGES/TEAM/preview.jpg</Thumbnail>  
  <Preview>1033/IMAGES/TEAM/preview.jpg</Preview>  
</Templates>  
</SPThemes>
```

Site Theme Changes through Browser

Class Site


Site Human Resources Travel Site Actions

SPD Class Site > Site Settings > Site Theme

Site Theme

Use this page to change the fonts and color scheme for your site. Applying a theme does not affect your site's layout, and will not change any pages that have been individually themed.

Select a Theme



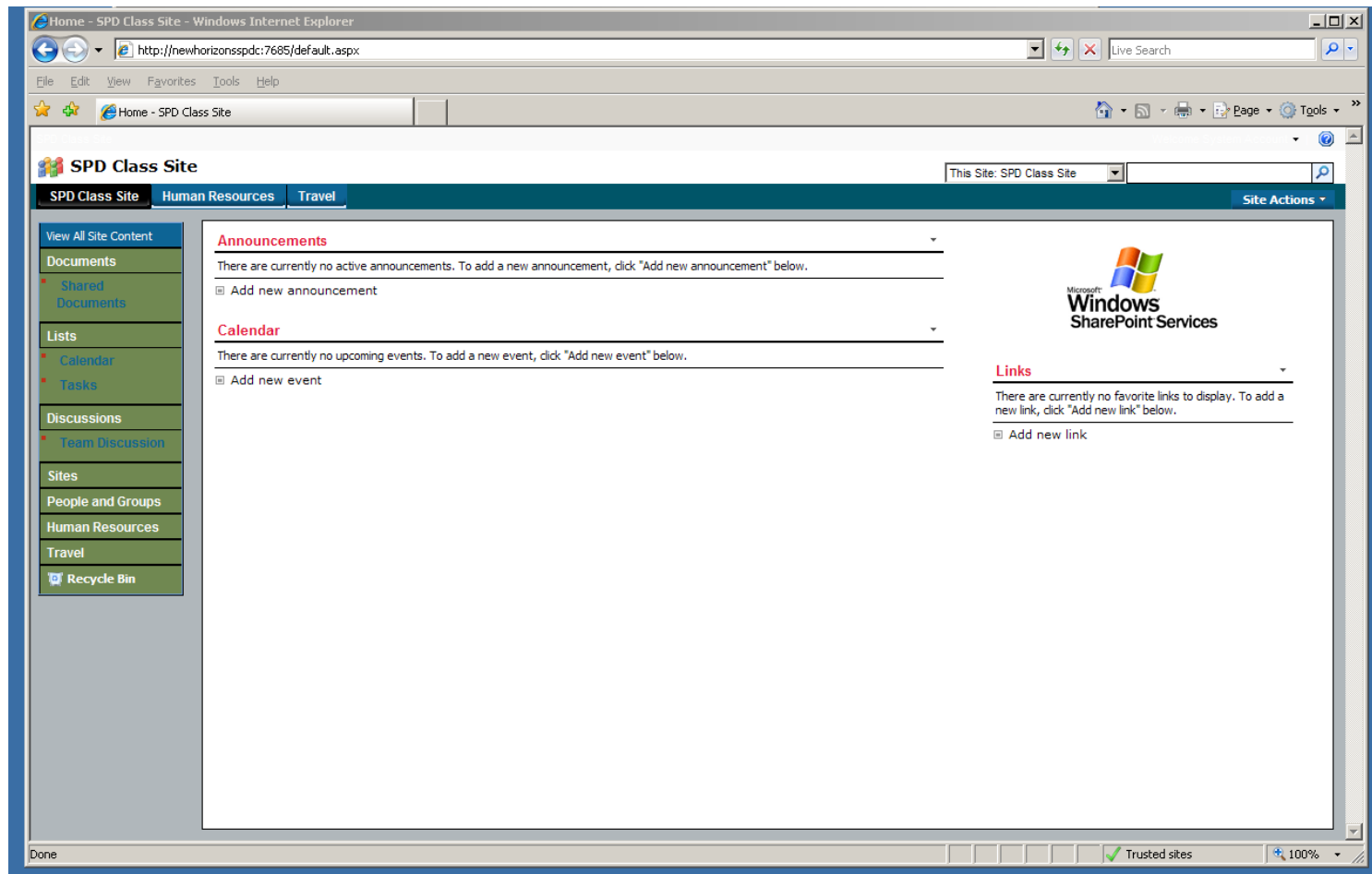
The preview shows a website with a yellow and white color scheme. The main header features the word 'TEAM' in large, bold letters. Below the header, there are several content blocks, including a sidebar with navigation links, a main content area with text and images, and a footer area. The overall design is clean and professional.

Preview

- Default Theme
- Events Site Theme
- Granite
- Hub Site Theme
- Jet
- Lacquer
- Lichen
- OARP Site Theme
- Obsidian
- Petal
- Plastic
- Procurement Site Theme
- Publishing Site Theme
- Reflector
- Simple
- Sporting Site Theme
- Start Up Site Theme
- Team Site Theme
- Verdant
- Vintage
- Wheat

Apply Cancel

Theme Only Changes



Questions

