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A Sensible Framework for SharePoint Intranet Navigation

It's never the first thing that I get asked on an engagement. It's never the burning question in the minds of my customer as they seek out a consultant to help them with SharePoint. However, sooner or later it eventually comes to the topic of navigation. Although the fundamental concepts behind a sensible navigation framework are simple, they are not well understood by developers or designers. This article is designed for both audiences as they seek to make SharePoint usable.

Foolish Consistency is the Hobgoblin of Little Minds

Emerson (who said "Foolish consistency is the hobgoblin of little minds") is a personal favorite author of mine; however, he didn't have to train hoards of users how to use a new interface. There's definitely something to be said for creating the kind of navigation that users are accustomed to. In the world of the Web that means navigation belongs on the top and on the left.

Nearly every non-marketing Web site will follow a pattern with navigation on the top and on the left-hand side. While what is on the top and left side differs, the fact that these spaces are reserved for navigation normally does not. So if you've got a wild side, or feel like training scores of users, you can move the navigation — otherwise we're more or less stuck with the accepted norm.

Interstate Travel

Navigation can be conceptualized as the roads system that we all use everyday to get from point A to point B. There are different types of roads: winding roads that snake their way through a subdivision, the neat squares of most city streets, and beyond to limited access highways and interstates. Each type of road is different in its scope, its speed, and its purpose.

We use interstates as a mechanism for traveling long distances. In navigation terms, this is the global navigation. Global navigation takes you from one very large area of a site to another, completely different area of the site. This is much like traveling from Indianapolis, Ind., to Columbus, Ohio. The distance is far in relative terms, but because of the interstate (I-70) that connects the two cities, the trip can be made in little more time than people spend commuting to work. Two and a half hours is a bit longer than the average commute, but it's certainly much less time than the distance between the two cities would seem to imply. The cities are 180 miles apart.

In SharePoint terms, the global navigation moves you from one large area of the portal to another large area of the portal. Global navigation on the portal generally goes across the top and includes both a home link and a help link. The other links — the rest of global navigation — will appear, which map to the top levels of the taxonomy you develop. Global navigation generally appears across the top of the Web site.

In larger sites, the global navigation breaks down into smaller, but still somewhat large, sections. This is much like the "loop" interstates that encircle many large cities in the U.S. They are still interstates, still moving you rapidly from one area to another, but they aren't intended to get you quite as far away.

City Streets

As necessary as interstates are to some travel they do not get you everywhere you want to go. While I can get from Indianapolis to Columbus, I cannot get from my home to my client's location. To get to the precise places I need to be, I need to use city streets. City streets connect to the interstates and offer the capability of getting me from my home to the interstate and from the interstate to the client location. City streets aren't as fast as interstates, and they are much more varied, however, they do perform an essential navigation function as they connect the last few miles. In SharePoint, navigating from one site in a hierarchy to another — or more specifically navigating within a site to another page — is the responsibility of site navigation

Site navigation is typically found on the top side of the left column of a Web page. It allows you to get to adjacent sites such as the parent of the current site, the children of the current site and perhaps even siblings. It also allows you to navigate to different sections within the site itself. This allows users to find their way to the specific area in the site that they want to get to.

Site level navigation is the city streets. It still speeds you from one place to another in a relatively structured way. It's also like city streets in that there are many more variations of roads in city streets than there are in interstates. Site navigation will differ not only between organizations but will likely change slightly to accommodate the specific needs of some sites within the organization.

Subdivision Drive

City roads are great for most situations. You can get to most of the population via city streets; however, there are occasions when you need to use the winding roads of a subdivision to get to where you need to go.

In the SharePoint world, this happens when you have an application that you've integrated into SharePoint that needs its own navigation. This navigation is separate from the site navigation and provides more detailed navigation into an area. For instance, navigating to a different view in a list would fit into this category. You've navigated to the list, but you need to further navigate to the correct view.

This kind of navigation isn't needed for every situation, but it's important for special use cases where the site navigation just doesn't get you to the level of detail that you need. The application level navigation is often found below the site navigation, and occasionally above it, in the left bar. This is a further refinement of the closer range navigation.

One important note is that SharePoint itself breaks this model slightly when it provides toolbars over items to edit in a list. Despite the fact that many of the links for the list are in the left navigation bar, a few of the navigational links appear in the search bar ' creating confusion on where to go to be able to navigate home.

The Impact of Search

The navigational paradigm laid out above is a simple framework for developing the specific navigation that your site needs. It doesn't address the use of specific navigational technologies such as hover (expanding) menus, how to implement tree-views, or other details that are important to how your specific site is implemented. That's because those details are important to the branding of the site but they aren't a critical component of a navigation framework familiar to users of Internet Web sites . However, there is one implementation detail that does have an impact on navigation organization that should be addressed here — that is the impact of search on navigation.

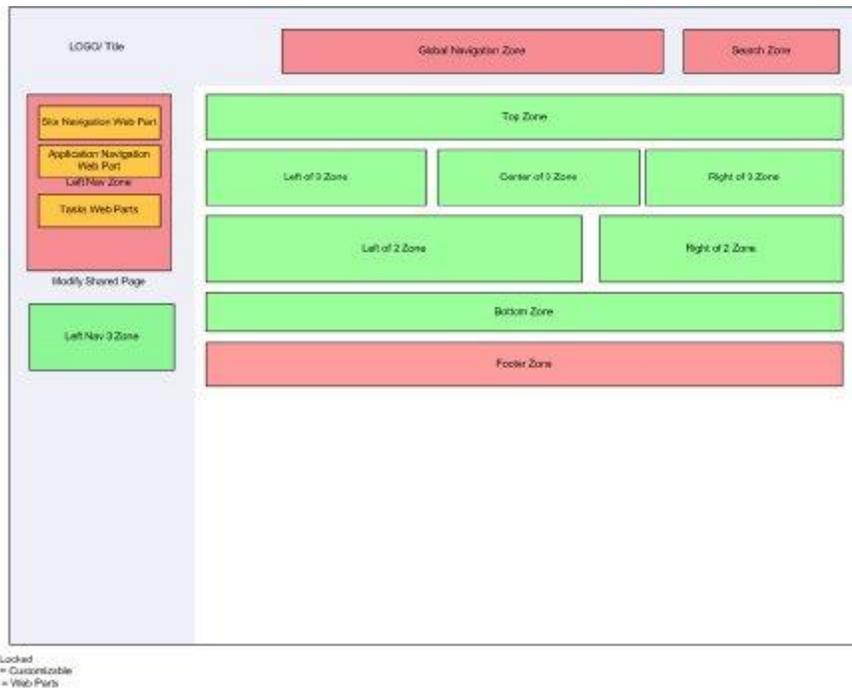
Navigation is about allowing people to get to where they're going quickly. No matter how organized the taxonomy and how efficient the navigational tools, there will always be times when search will be a more efficient mechanism for navigation. From the perspective of navigation, search offers an interesting opportunity. It's like the phone booth from *Bill and Ted's Excellent Adventure*. You dial up the place you want and a few short moments (or clicks) later you end up there.

Generally, if search is well configured you have the opportunity to get to the item you're looking for in two or three clicks. This is irrespective of where the information is in the organization. However, much like the phone booth, you have to dial the right number — or in this case enter recognizable keywords. If you don't, the place you end up may not be where you want to be.

Users will use search when they don't know where the information that they are looking for is, or if they know a keyword that they can use to find the specific result they are looking for. In other words, they will always use search when they're lost. They may also use search when they know that the link they want will appear high in the search results list. Gone are the "quick codes" from systems of the 80s; instead users use quick keywords to navigate directly to the page they need.

Putting the Framework Together

When assembled together the various components of navigation: global navigation, site navigation, application navigation, and search can make your site seem helpful to users looking for the right information at the right time. The figure below shows a wireframe representation of a SharePoint site that leverages the navigation technologies and techniques discussed here.



About the Author

Robert Bogue, MCSE (NT4/W2K), MCSA:Security, A+, Network+, Server+, I-Net+, IT Project+, E-Biz+, CDIA+ is the president of Thor Projects LLC. He has contributed to more than 100 book projects and numerous other publishing projects. He was recently honored to become a Microsoft MVP for Microsoft Office SharePoint Server. Before that Robert was a Microsoft Commerce Server MVP and before that Microsoft Windows Servers-Networking MVP. Robert blogs at <http://www.thorprojects.com/blog> You can reach Robert at Rob.Bogue@thorprojects.com.