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PeopleSoft

# PeopleSoft Interaction Hub 9.1: Branding

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PeopleSoft Interaction Hub 9.1: Branding
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# Contents

# Preface

## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

## Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

## Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

## Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

## Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

• Application Fundamentals

• Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| *Typographical Convention* | *Description* |
| --- | --- |
| **Key+Key** | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( | ). |
| [ ] (square brackets) | Indicate optional items in PeopleCode syntax. |
| & (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br><br>Ampersands also precede all PeopleCode variables. |

| Typographical Convention | Description |
|---|---|
| ⇒ | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

# ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

# Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

## Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

• Asia Pacific

• Europe

• Latin America

• North America

## Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

• USF (U.S. Federal)

- E&G (Education and Government)

## Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

# Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.

- Managing hosted Online Help.

- Managing locally installed PeopleSoft Online Help.

# About PeopleSoft Interaction Hub

This section discusses:

- PeopleSoft Portal Solutions product family.

- PeopleSoft Interaction Hub and PeopleTools.

## PeopleSoft Portal Solutions Product Family

This section discusses the products that are part of the PeopleSoft Portal Solutions product family:

### PeopleSoft Interaction Hub

Oracle's PeopleSoft Interaction Hub is a world-class portal solution with many robust content and collaborative features. The PeopleSoft Interaction Hub is ideal for customers wishing to deploy an unlimited number of communities across an enterprise that focusses on PeopleSoft application business processes.

PeopleSoft Interaction Hub 9.1 contains a rich set of Web 2.0 features. For instance, collaborative workspaces and related content services can be keyed to PeopleSoft application transactions providing contextually relevant collaboration.

Two key characteristics distinguish PeopleSoft Interaction Hub as a rich Web 2.0 platform:

- First, PeopleSoft Interaction Hub is a traditional portal framework that can be used for aggregating and managing content from multiple applications and sources. With unified navigation, it is now simple to configure PeopleSoft Interaction Hub to federate multiple PeopleSoft application systems.

- Second, its collaborative capabilities make PeopleSoft Interaction Hub a functional application that complements the features found in PeopleSoft applications.

## PeopleSoft Interaction Hub and PeopleTools Portal Technology

To understand the functionality of PeopleSoft Interaction Hub, Oracle recommends that you familiarize yourself with PeopleTools, focusing especially on the subject areas and sections that are devoted to portal functionality. Because PeopleSoft Interaction Hub builds upon the basic internet architecture that is delivered with PeopleTools, this information gives you an excellent foundation of knowledge upon which the PeopleSoft Interaction Hub suite of documentation builds.

PeopleTools portal technology is built on top of PeopleSoft Pure Internet Architecture and enables you to easily access and administer multiple content providers, including PeopleSoft databases such as Oracle's PeopleSoft HRMS or Oracle's PeopleSoft CRM, as well as non-PeopleSoft content. It enables you to combine content from these multiple sources and deliver the result to users in a unified, simple-to-use interface.

The main elements of the PeopleTools portal technology are a portal servlet and an application server. These two elements work together to provide common portal processing features such as page assembly, search, content management, navigation, and homepage personalization.

Product documentation for PeopleTools covers the PeopleSoft Pure Internet Architecture and PeopleTools portal technology in detail.

See *PeopleTools: Portal Technology*.

# Related Documentation

This section discusses:

- PeopleSoft Interaction Hub documentation.

- PeopleTools documentation.

## PeopleSoft Interaction Hub Documentation

PeopleSoft Interaction Hub documentation includes:

- *PeopleSoft Interaction Hub: Branding*

  This subject covers PeopleSoft Interaction Hub's branding feature, which is built on the PeopleTools branding framework. Branding enables you to create branding definitions and apply branding themes to portals, sites, and workspaces allowing you to create a differentiated appearance for specific user audiences.

- *PeopleSoft Interaction Hub: Collaborative Workspaces*

This subject covers setup, administration, and use of collaborative workspaces, which are virtual team rooms that facilitate collaboration on a variety collaborative projects and processes.

- *PeopleSoft Interaction Hub: Content Management System*

This subject describes the content management system, which includes features to help you manage, create, and organize content. The resulting content is ready and available for placement in various portal pagelets and news publications; reuse in workspaces, calendars, and other portal features; or available just for browsing.

- *PeopleSoft Interaction Hub: Portal and Site Administration*

This subject covers tasks for administering portals and sites including product configuration, system-wide setup and administration, integration with third-party systems, and so on.

- *PeopleSoft Interaction Hub: Using Portal Features*

This subject covers setup and usage of items such as blogs, calendars, discussion forums, feeds, tagging, searching, related content services, and other features of PeopleSoft Interaction Hub.

## PeopleTools Documentation

PeopleSoft Online Help for PeopleTools contains the complete set of subject areas covering PeopleTools 8.53. In particular, several of these subjects are useful to the setup, administration, and use of PeopleSoft Interaction Hub including:

- *PeopleTools: Feed Publishing Framework*

The PeopleTools Feed Publishing Framework supports the publication of PeopleSoft Interaction Hub data as feeds. In addition, the framework can be used to develop custom feed types.

- *PeopleTools: Integration Broker*

PeopleSoft Integration Broker facilitates the exposure of PeopleSoft business logic as services and the consumption of external web services. Integration Broker also supports synchronous and asynchronous messaging between PeopleSoft applications and with third-party systems.

- *PeopleTools: Portal Technology*

PeopleTools portal technology is the foundation of the PeopleSoft Interaction Hub product. This subject covers critical portal technologies such as portal implementation, PeopleSoft Pure Internet Architecture, Pagelet Wizard, the PeopleSoft Related Content Framework, and others.

- *PeopleTools: Security Administration*

This subject covers important security-related topics including PeopleTools user profiles, roles, permission lists, single sign-on (SSO), and others.

- *PeopleTools: Applications User's Guide*

This subject provides general information about PeopleSoft applications useful to all users of PeopleSoft systems. Topics include an introduction to the PeopleSoft Pure Internet Architecture,

explanation of how to navigate through the system, how to perform searches, elements of application pages, and so on.

**Note:** These subjects and others in the PeopleSoft Online Help are referenced as needed.

# PeopleSoft Portal Solutions Related Links

PeopleSoft Interaction Hub 9.1 Documentation Home Page [ID 887960.1]

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

# Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

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**Chapter 1**

# Getting Started with Branding in PeopleSoft Interaction Hub

## Branding Overview: PeopleTools and PeopleSoft Interaction Hub

As of PeopleTools 8.54 (and PeopleSoft Interaction Hub 9.1 Revision 3), the majority of branding features are delivered in PeopleTools and are available in all PeopleSoft applications.

PeopleTools provides branding features that are powerful and flexible, allowing you to manage the look and feel of any PeopleSoft application. With PeopleTools, many common branding tasks, including managing definitions and objects associated with the overall site style are performed online in the browser. In addition, other tasks such as maintaining style sheets, images, and other objects can be performed either online or by using Application Designer.

With PeopleTools branding, you can apply branding definitions to:

- The entire system.

- Individual portals.

- Users by role or permission list.

- Individual classic components.

- Fluid components by node.

For an additional overview of PeopleTools branding features, see *PeopleTools: Portal Technology*, "Using PeopleTools Branding Features," Understanding PeopleTools Branding.

## Additional Features in PeopleSoft Interaction Hub

Branding in PeopleSoft Interaction Hub builds on the branding features delivered in PeopleTools. Additional branding features delivered in PeopleSoft Interaction Hub include:

- Branding WorkCenter

  The Branding WorkCenter organizes access to PeopleTools branding features and allows you to view and manage branding settings across a cluster of PeopleSoft applications. See Using the Branding WorkCenter for more information.

- Branding definitions including headers, themes, skins, theme assignments, system elements, and branding user attributes.

These branding definitions incorporate PeopleSoft Interaction Hub-specific features, such as My Links and the Guest homepage, into branding for the portal. See <u>Understanding Delivered Branding Definitions</u> for more information.

- Custom Tabs custom tabs navigation collection.

    This Custom Tabs custom tabs navigation collection is delivered with 12 pre-defined links as sample data. See <u>Custom Tabs Navigation Collection</u> for more information.

**Chapter 2**

# Branding Definitions Delivered in PeopleSoft Interaction Hub

## Understanding Delivered Branding Definitions

The following sections provide information on these branding definitions delivered with PeopleSoft Interaction Hub:

- Branding themes, header definitions, and skin style sheets.

- Branding theme assignments.

- Branding system element definitions.

- Branding user attribute definitions.

- Custom Tabs navigation collection.

## Themes, Headers, and Skins

This topic describes the theme, header, and skin branding definitions delivered with PeopleSoft Interaction Hub. The following table lists the delivered branding themes along with the delivered definitions used in these themes:

| Theme | Homepage Header[1] | Footer | Theme Style Sheet (Classic) | Skins |
|---|---|---|---|---|
| PAPPBR_THEME_ TANGERINE | PAPPBR_HEADER9_PT_ TANGERINE | DEFAULT_ FOOTER[2] | NA | PAPPBR_GUEST_ SKIN |
| PAPPBR_THEME_ TANGERINE_ALT | PAPPBR_HEADER9_ TANGERINE_ALT | DEFAULT_ FOOTER[2] | DEFAULT_THEME_ TANGERINE_ALT | PAPPBR_GUEST_ SKIN |
| PAPPBR_THEME_CW_ TANGERINE | PAPPBR_HEADER9_ WORKSPACE_TANG | DEFAULT_ FOOTER[2] | NA | NA |
| PAPPBR_THEME_ OOWDEMO | PAPPBR_HEADER10_ OOWDEMO | NA | PAPP_OOW_THEME_ CSS | NA |

[1] The specified header is also used as the target page header, whether explicitly specified in the theme definition or implicitly when no target page header is specified.

[2] The DEFAULT_FOOTER definition is delivered with PeopleTools.

This topic is organized by these branding theme definitions:

- PAPPBR_THEME_TANGERINE

- PAPPBR_THEME_TANGERINE_ALT

- PAPPBR_THEME_CW_TANGERINE

- PAPPBR_THEME_OOWDEMO

# PAPPBR_THEME_TANGERINE Theme

The PAPPBR_THEME_TANGERINE theme is the branding theme for portals and sites that is compatible with the Tangerine (PT8.53 default) theme style family. This theme includes PeopleSoft Interaction Hub-specific modifications to DEFAULT_THEME_TANGERINE—for example, Add to My Links is displayed in the portal header and My Links features are enabled in the Favorites drop-down menu. The PAPPBR_THEME_TANGERINE theme presents a portal header similar to the default theme available in PeopleSoft Interaction Hub 9.1 Revision 2.

The PAPPBR_THEME_TANGERINE theme is the default theme assigned to the EMPLOYEE, CUSTOMER, PARTNER, and SUPPLIER portals and in the PS_SITETEMPLATE definition.

In the following example, the PAPPBR_THEME_TANGERINE theme is in effect for the user signed into this portal:
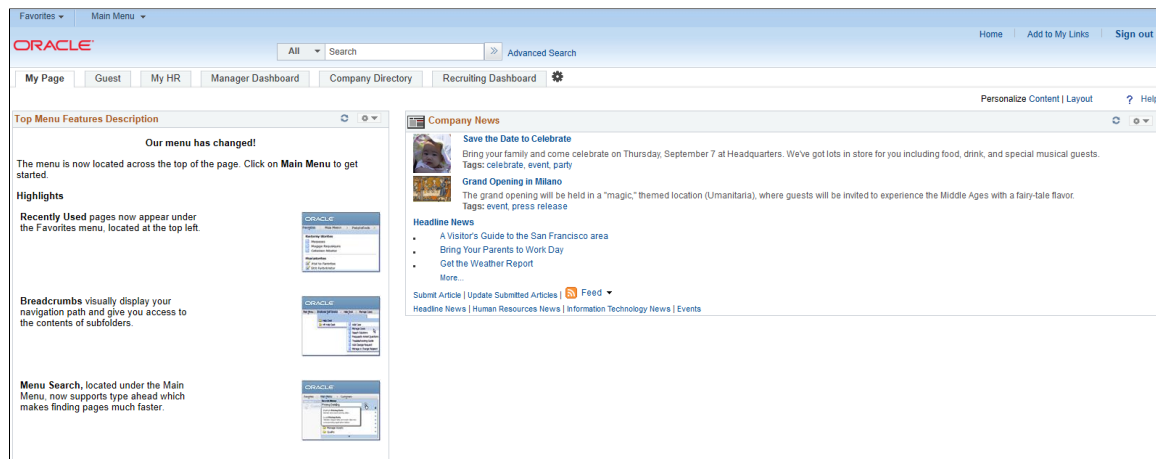


# PAPPBR_THEME_TANGERINE_ALT Theme

The PAPPBR_THEME_TANGERINE_ALT theme is an alternate branding theme for portals and sites that presents a portal header that is compatible with PeopleSoft fluid components and that is also compatible with the Tangerine (PT8.53 default) theme style family. This theme includes PeopleSoft Interaction Hub-specific modifications to DEFAULT_THEME_TANGERINE_ALT—for example, My Links features are enabled in the Favorites drop-down menu; however, Add to My Links is not displayed in the portal header.

In the following example, the PAPPBR_THEME_TANGERINE_ALT theme is in effect for the user signed into this portal:
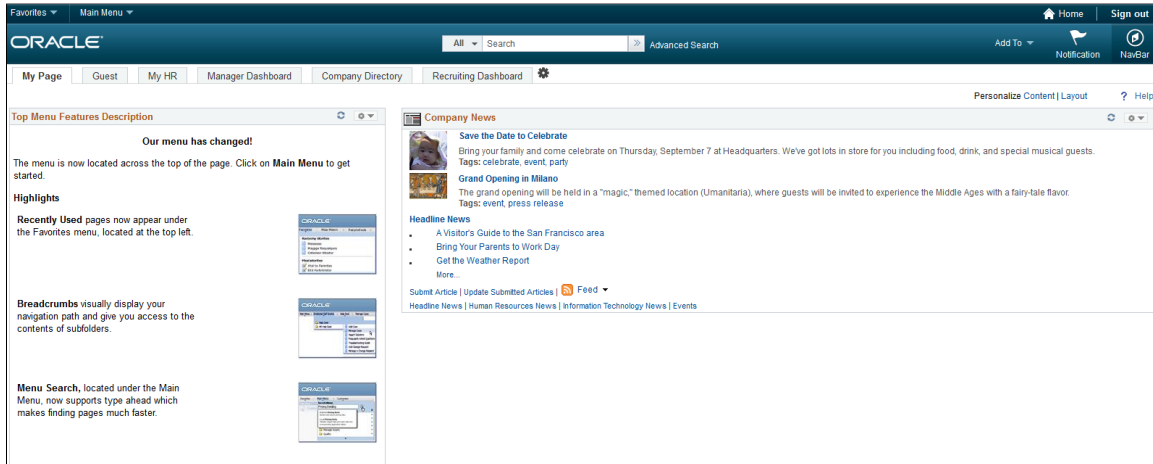


The PAPPBR_THEME_TANGERINE_ALT theme specifies a header definition that includes several fluid-specific widgets: Add To, Notification, and NavBar as shown in the preceding example. However, specifying this theme does not in and of itself enable fluid mode or ensure the display of these widgets. To enable fluid mode, you must do the following:

•   Enable fluid mode system wide on the active web profile.

•   Optionally, enable fluid mode for desktop computers on the active web profile.

•   Access the system using a fluid compatible browser.

For more information on enabling fluid mode, see *PeopleTools: Fluid User Interface Developer's Guide*, "Managing Fluid User Interface System Settings," Configuring Fluid Mode Web Profile Settings.

For more information on fluid compatible browsers, see the certifications for PeopleTools 8.54 on My Oracle Support.

## PAPPBR_THEME_CW_TANGERINE Theme

The PAPPBR_THEME_CW_TANGERINE theme is the branding theme for collaborative workspaces that is compatible with the Tangerine (PT8.53 default) theme style family. The PAPPBR_THEME_CW_TANGERINE theme presents a workspace header similar to the default workspace theme available in PeopleSoft Interaction Hub 9.1 Revision 2.

In the following example, the PAPPBR_THEME_CW_TANGERINE theme has been used as the theme for the workspace:
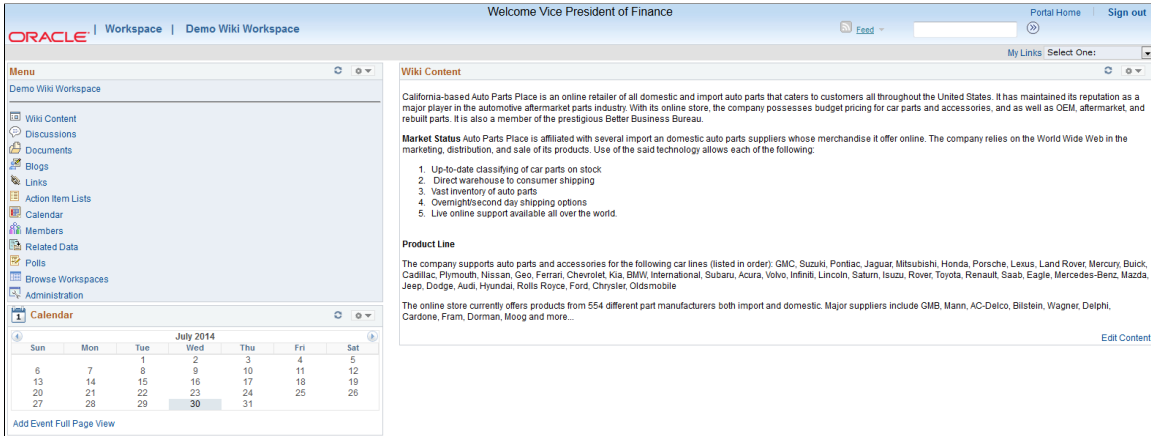


## PAPPBR_THEME_OOWDEMO Theme

The PAPPBR_THEME_OOWDEMO theme is an example branding theme for portals and sites that is compatible with the Tangerine (PT8.53 default) theme style family. This theme was developed for demonstrations at Oracle Open World.

In the following example, the PAPPBR_THEME_OOWDEMO theme is in effect for the user signed into this portal:
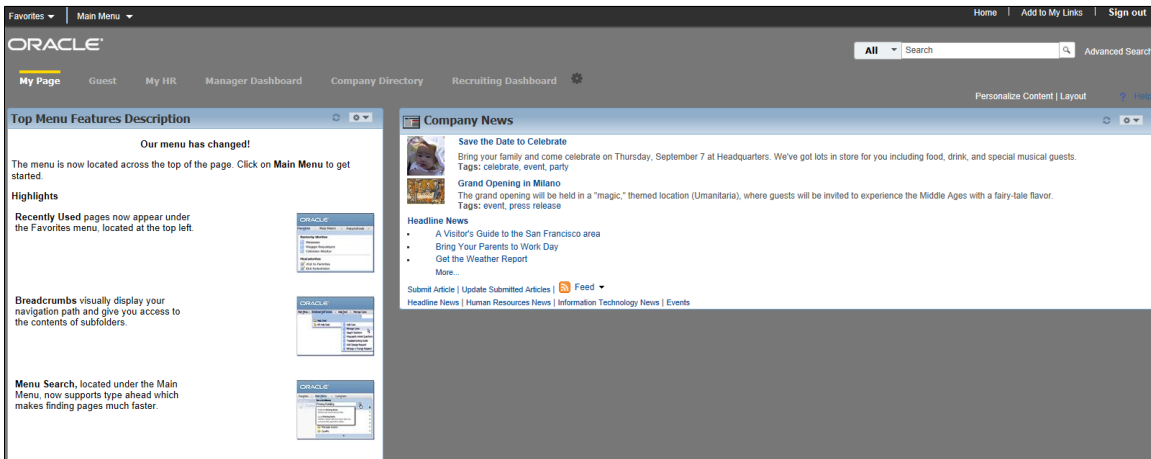


## Theme Assignments

PeopleSoft Interaction Hub is delivered with default theme assignments for the EMPLOYEE, CUSTOMER, PARTNER, and SUPPLIER portals and in the PS_SITETEMPLATE definition.

In the following example, the Assign Branding Themes page shows the settings for the EMPLOYEE portal. The same settings are also used for the CUSTOMER, PARTNER, and SUPPLIER portals. The PS_SITETEMPLATE definition includes similar settings, but there are no user attribute-based theme assignments for PS_SITETEMPLATE.



# Branding System Elements

The following table lists the branding system elements delivered in PeopleSoft Interaction Hub:

| Name | Description |
|------|-------------|
| ADD_TO_MY_LINKS_LINK | Used to include the Add to My Links link in a header definition.<br><br>**Important!** This element also requires the inclusion of the ADD_TO_MY_LINKS _WIDGET element. |
| ADD_TO_MY_LINKS_WIDGET | Used to include JavaScript code to support My Links functionality. This JavaScript also supports the Add to My Links link and the My Links drop-down menu, which can independently be added to a header definition. |
| MY_LINKS_DROPDOWN_MENU | Used to include the My Links drop-down menu in a header definition.<br><br>Because My Links functionality is included in the Favorites menu, delivered portal header definitions do not include this element. However, since a workspace does not provide access to the Favorites menu, the delivered workspace header definition includes this element.<br><br>**Important!** This element also requires the inclusion of the ADD_TO_MY_LINKS _WIDGET element. |
| WS_GREETING | Used to include the workspace greeting in a workspace header definition. |

| Name | Description |
|---|---|
| WS_PORTAL_HOME | Used to include the Portal Home link, which returns to the user to the default portal homepage, in a workspace header definition. |
| WS_RELATED_FEEDS_WIDGET | Used to include the Feed widget in a workspace header definition. |
| WS_SEARCH_BOX_WIDGET | Used to include the Search widget in a workspace header definition. |
| WS_TITLE | Used to include the workspace title in a workspace header definition. |

# Branding User Attributes

PeopleSoft Interaction Hub delivers an additional user attribute that can be used in branding theme assignments.

### SITE_BASED User Attribute

Use the SITE_BASED attribute to apply different branding themes based on the site used to access the PeopleSoft Interaction Hub system. In this context, *site* refers to the PIA site (or PIA domain) created through psadmin, and not to PeopleSoft Interaction Hub sites created through Site Manager. For example:

- A university that separates each campus by PIA site could use the SITE_BASED attribute to apply a different branding theme for each campus.

- A financial institution that provides financial services to the employees of its corporate customers could use the SITE_BASED attribute to apply a different branding theme for each corporate account.

The PIA site name appears in the URL just before the portal name and the node name. In the following example, *p91dap08x* is the value for the site name that would be used with the SITE_BASED attribute:

```
http://example.com:8000/psp/p91dap08x/EMPLOYEE/EMPL/c/...
```

# Custom Tabs Navigation Collection

PeopleSoft Interaction Hub delivers the Custom Tabs (PAPP_CUSTOM_TAB) navigation collection, which provides examples of how to link to remote content in a *custom tabs navigation collection.* This navigation collection allows you to use links to local or remote content references that are then rendered as homepage tabs. For more information on a custom tabs navigation collection, see *PeopleTools: Portal Technology*, "Using PeopleTools Branding Features," Additional Branding Tasks, Understanding Navigation Collections Used to Create Custom Homepage Tabs.

PeopleSoft Interaction Hub's Custom Tabs navigation collection is delivered with 12 pre-defined links as sample data (11 links defined for the EMPLOYEE portal, 1 link defined for the CUSTOMER portal). Each link will automatically appear as a custom homepage tab only after the remote content provider systems hosting that link is configured under unified navigation in the PeopleSoft Interaction Hub system.

In the following example, the PeopleSoft Interaction Hub displays multiple homepage tabs. The My Page, Guest, and My HR tabs are standard homepage tabs defined in the PeopleSoft Interaction Hub system. The other three tabs are defined in the Custom Tabs navigation collection. The Manager Dashboard, Company Directory, and Recruiting Dashboard tabs are custom homepage tabs defined on the remote HRMS node of the PeopleSoft HCM system.
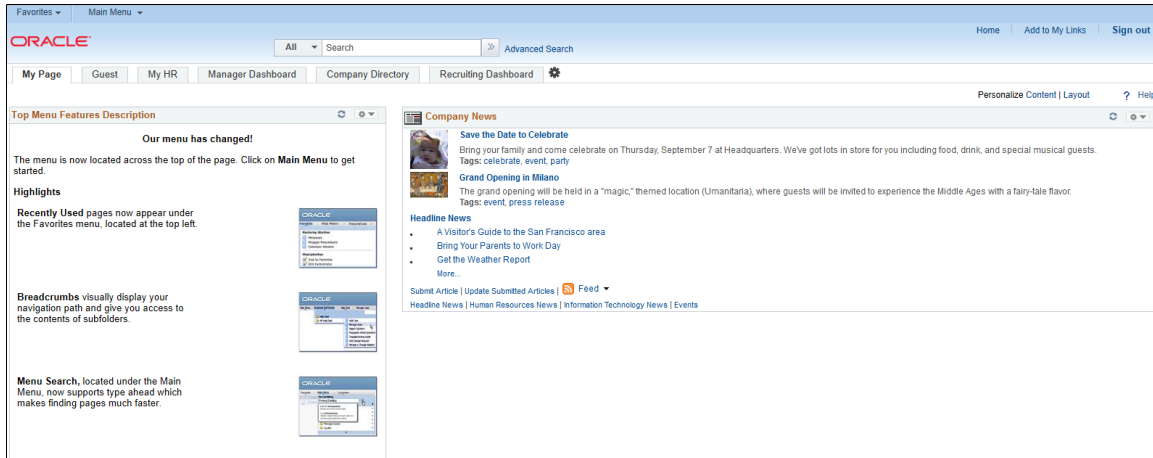


You can create additional custom tabs navigation collections to suit your needs. For more information on creating and maintaining a custom tabs navigation collection, see *PeopleTools: Portal Technology*, "Using PeopleTools Branding Features," Additional Branding Tasks, Creating and Maintaining Navigation Collections for Custom Homepage Tabs.

**Chapter 3**

# Administering Branding in PeopleSoft Interaction Hub

## Understanding Branding Administration

In PeopleSoft Interaction Hub, branding administration tasks include:

- Enabling or disabling the PeopleSoft Interaction Hub Revision 3 branding feature—that is, enabling or disabling the PeopleTools branding framework.

- Using the Branding WorkCenter to:

  - Identify branding system settings for all systems in the cluster.

  - Manage branding features and definitions in the local PeopleSoft Interaction Hub system.

  - Manage selected settings on each remote system in the cluster.

  - Publish fluid component theme style sheet mappings to all remote systems in the cluster.

## Enabling the Revision 3 Branding Features

As of PeopleSoft Interaction Hub 9.1 Revision 3 and PeopleTools 8.54, the majority of the branding features are delivered in PeopleTools itself. For the purposes of this topic, these features are referred to as the "PeopleTools branding framework." For new installations of PeopleSoft Interaction Hub at Revision 3 and for customers who upgrade to Revision 3 by applying Maintenance Pack 3, the PeopleTools branding framework is enabled by default.

However, if you have upgraded your PeopleSoft Interaction Hub database to Revision 3 by a route other than applying Maintenance Pack 3, then you can elect to manually enable the PeopleTools branding framework, or you can remain on PeopleSoft Interaction Hub's native branding framework, which was the framework available in PeopleSoft Interaction Hub Revision 2 and previous releases.

To manually enable the PeopleTools branding framework and Revision 3 branding features:

1. Select **Portal Administration** > **System Data** > **Installation Options**.

2. Select the **Features** page.

3. Select the Enabled check box for the Revision 3 row.

4. Click Save.

**Related Links**

"Features Page" (Portal and Site Administration)

# Using the Branding WorkCenter

This topic discusses prerequisites and how to use the Branding WorkCenter.

## Pages Used in the Branding WorkCenter

| Page Name | Definition Name | Usage |
|-----------|-----------------|-------|
| System Options Page | PTBR_NODE_NETWORK | Review branding system settings for each system in the cluster. |
| Themes Page | PTBR_SYNC_THEME | Manage fluid component theme style sheet mappings. |
| Create Data Migration Project Page | PTBR_CREATE_ADS | Create a Data Migration Workbench project to migrate theme data to another system. |

## Prerequisites to Managing Branding Across a Cluster of PeopleSoft Applications

A *cluster* is a collection of PeopleSoft applications that contains one PeopleSoft Interaction Hub database, and one or more application databases. The PeopleSoft Interaction Hub system serves as both the administrative center for federating the cluster of application systems and as the gateway to access the application content.

While you can use other methodologies to integrate multiple PeopleSoft applications so that you can manage branding from the PeopleSoft Interaction Hub system, the simplest and most complete methodology is to use unified navigation to federate the systems. For more information, see "Understanding Unified Navigation" (Portal and Site Administration).

**Note:** While your cluster can include more than one instance of a PeopleSoft application—for example, two or more instances of PeopleSoft HCM—the Branding WorkCenter will automatically generate links to manage remote branding settings for certain remote content provider node names only—specifically, for nodes named HRMS, ERP, ELM, or CRM. Therefore, only the PeopleSoft HCM instance with the remote content provider node named HRMS can be managed through the Branding WorkCenter.

## Understanding the Branding WorkCenter

The Branding WorkCenter organizes access to managing branding locally and across a cluster of PeopleSoft applications. The Branding WorkCenter provides access to:

- All of the PeopleTools pages used to manage branding features and definitions in the local PeopleSoft Interaction Hub system.

- Selected PeopleTools pages that allow you to remotely manage settings on certain *live* systems in the cluster. These selected pages include:

  - Branding System Options

  - Component Branding

  - Pagelet Branding

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**Note:** A *live* system is one that is up and running when the Branding WorkCenter is accessed. While a system might be configured as part of the cluster, if it is not up and running when the Branding WorkCenter is accessed, then current system information and links to remotely manage its branding settings will not be displayed in the Branding WorkCenter. Moreover, these links can be displayed for certain systems only. Specifically, links for remote content provider nodes named HRMS, ERP, ELM, or CRM will be displayed. If the remote content provider node has another name—for example, HRMS2, or ERP_EMEA, and so on—then no links can be automatically generated to manage branding settings on that system.

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- WorkCenter-specific pages to:

  - Identify branding system settings for all *live* systems in the cluster.

  - Publish fluid component theme style sheet mappings to all remote systems in the cluster.

The starting page of the Branding WorkCenter summarizes the system settings for all of the systems in the cluster. In the following example, three configured systems are live in the cluster: PeopleSoft FSCM (E92DP343 node), PeopleSoft HCM (H21DP343 node), and PeopleSoft Interaction Hub (P91DP343 node).



The first three links (Define Headers and Footers, Assemble Themes, and Assign Themes) provide access to manage these branding settings on the local PeopleSoft Interaction Hub system only.

In addition, the System Options folder, Component Branding folder, and Pagelet Branding folder each contain links to manage settings for the local system and all remote systems in the cluster.

Finally, the System Definitions folder contains links to manage branding elements, user attribute types, and branding objects, and to generate theme style sheets on the local PeopleSoft Interaction Hub system only.

The Branding WorkCenter also provides access to selected pages that allow you to remotely manage settings on each system in the cluster. In the following example, the Branding System Options page is displayed for the PeopleSoft HCM system within the Branding WorkCenter.

**Note:** The Branding pagelet displays the remote system name in parenthesis after the page name; no such designation is given for the local PeopleSoft Interaction Hub system. However, the page itself does not display any indication of the system or remote content provider node. These links can be displayed for certain systems only. Specifically, links for remote content provider nodes named HRMS, ERP, ELM, or CRM will be displayed. If the remote content provider node has another name—for example, HRMS2, or ERP_EMEA, and so on—then no links can be automatically generated to manage branding settings on that system.
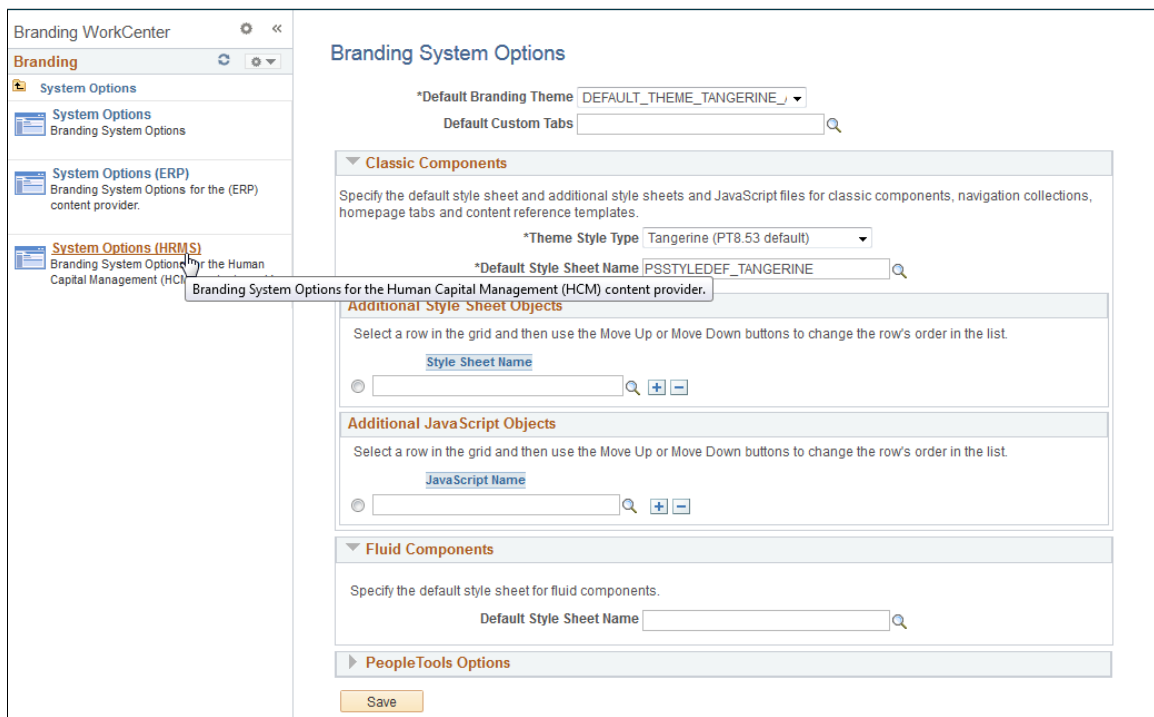


When a system is configured as part of the cluster, but it is currently offline, the system is still listed on the WorkCenter's System Options page. In the following example, the PeopleSoft FSCM system is offline, so no information is available on the current branding system settings. In addition, the automatically generated link for System Options (ERP) is not displayed in the Branding pagelet at the left.
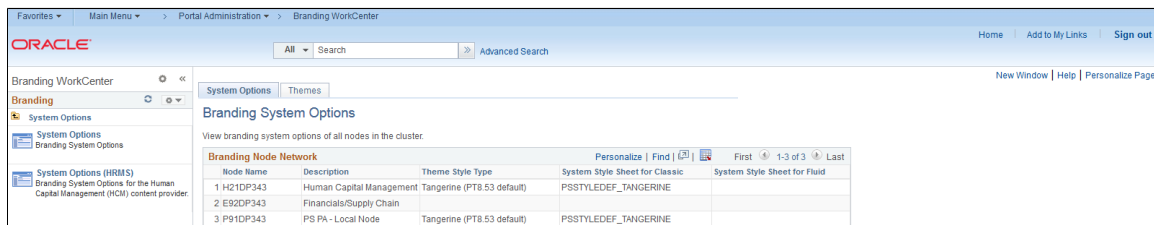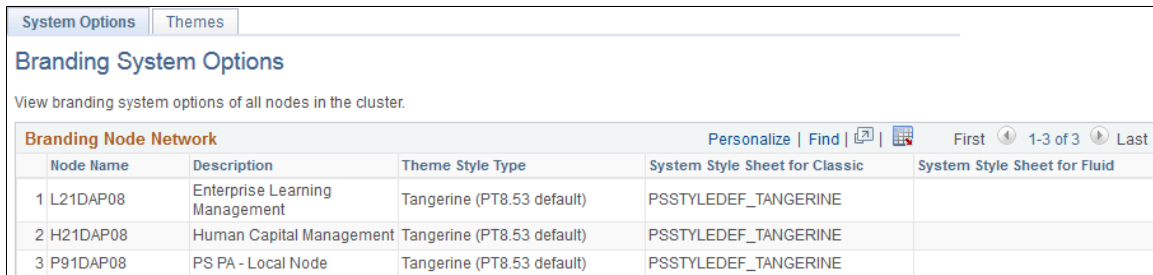
# System Options Page

Use the System Options page (PTBR_NODE_NETWORK) to review branding system settings for each system in the cluster.

Navigation:

**Portal Administration** > **Branding WorkCenter**

This example illustrates the fields and controls on the System Options page. In this example, three systems are configured in the cluster: PeopleSoft FSCM (E92DP343 node), PeopleSoft HCM (H21DP343 node), and PeopleSoft Interaction Hub (P91DP343 node).



The System Options page displays a summary of the branding system settings for each system in the cluster. Because the System Options page is the starting page for the Branding WorkCenter, it is displayed automatically each time you access the WorkCenter.

# Themes Page

Use the Themes page (PTBR_SYNC_THEME) to manage fluid component theme style sheet mappings.

Navigation:

From the Branding WorkCenter starting page, select the Themes page.

This example illustrates the fields and controls on the Themes page. You can find definitions for the fields and controls later on this page.



| Field or Control | Description |
|---|---|
| **Keywords** | Enter keyword text to search against the theme ID, label, and description. |
| **Search** | Click the Search button to perform the search. If no keyword values are entered, then all theme definitions in the current system are displayed. |
| **Select** | Select this check box to select one or more theme definitions to be published or to be included in the Data Migration Workbench project. |
| **Select All** | Click this button to select all theme definitions. |
| **Clear All** | Click this button to deselect all theme definitions. |
| **Publish Fluid Theme Style Sheet Mappings** | Click this button to publish fluid style sheet mapping pairs for the selected theme definitions. See "Publishing Fluid Style Sheet Mappings" for more information. |
| **Create Data Migration Project** | Click this button to create a Data Migration Workbench project that includes the selected theme definitions. See "Creating a Data Migration Project" for more information.<br><br>**Note:** A Data Migration Project Workbench project is also referred to as an Application Data Set (ADS). |

Use the Themes page to manage fluid component theme style sheet mappings by:

• Publishing selected fluid component theme style sheet mapping pairs to the remote systems.

• By creating a Data Migration Workbench project for the selected themes.

## Publishing Fluid Style Sheet Mappings

To publish fluid style sheet mappings:

1. In the PeopleSoft Interaction Hub system, generate theme style sheet stubs for fluid components from the original base style sheets on the Generate Theme Style Sheets page. See *PeopleTools: Portal Technology*, "Using PeopleTools Branding Features," Additional Branding Tasks, Generate Theme Style Sheets for Fluid Components for more information.

2. In the PeopleSoft Interaction Hub system, register a base style sheet and theme style sheet pair for a specific node on the Assemble Themes page. See *PeopleTools: Portal Technology*, "Using PeopleTools Branding Features," Administering System Branding, Assembling Branding Themes for more information.

3. Access the Themes page in the Branding WorkCenter.

4. Select one or more branding theme definitions from the PeopleSoft Interaction Hub system.

5. Click the Publish Fluid Theme Style Sheet Mappings button.

---

**Important!** The theme definition themselves are not copied to the remote systems. Only active theme mapping data whose node name is not LOCAL_NODE are published. On the receiving side, when a theme definition with the same ID also exists in the target system, its active mapping data is replaced. When a theme definition with the same ID does not exist in the target system, a theme definition is *not* created, but the mapping data is copied regardless. To create the theme definition and associated style sheets and images in the target system first, create a Data Migration Workbench project and apply it to the remote system. Use the procedure in the following section, "Creating a Data Migration Project."

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## Creating a Data Migration Project

Use the Create Data Migration Project page (PTBR_CREATE_ADS) to create a Data Migration Workbench project to migrate theme data to another system.

This example illustrates the fields and controls on the Create Data Migration Workbench page. You can find definitions for the fields and controls later on this page.



| Field or Control | Description |
| --- | --- |
| Project Name | Enter a name for the data migration project. |
| Description | Enter a description for the data migration project. |
| Comments | Enter any additional comments that will appear with the project in Data Migration Workbench. |
| Include Headers and Footers | Select this check box to add the header and footer definitions used by the selected theme definitions into the project. |
| Include System Objects | Select this check box to add the image objects, HTML objects, style sheet objects, URL objects, and message catalog objects used by the header or footer definitions of the selected theme definitions into the project.<br><br>**Note:** This check box is displayed only when the Include Headers and Footers check box is selected. |

| Field or Control | Description |
|---|---|
| **Include Theme Style Sheets** | Select this check box to add the theme style sheets of the selected theme definitions into the project, which include the theme style sheets and skin style sheets for classic style sheets as well as mapped theme style sheets and global override style sheets for fluid components. Also included are the parent style sheets or children style sheets of those style sheet objects, when applicable, as well as images used by them. |

For more information on creating Data Migration Workbench projects, see *Using Data Migration Workbench," Defining Data Migration Project*.

**Chapter 4**

# PeopleSoft Fluid User Interface for Branding in PeopleSoft Interaction Hub

## Managing the Theme Builder Guided Process

A Theme Builder Guided Process is now available to enable you to create and update Branding Themes using a simple three-step guided process. You can apply new color schemes to both fluid and classic homepages as well as content pages. You can also mark a theme as a portal default or assign themes to specific user attributes like roles, permission lists, etc.

The Theme Builder enables you to update the styling of the following elements using an easy-to-use interface:

• Company logo.

• Homepage background color.

• Banner color and other elements like the Back button color and text color.

**Note:** For more information regarding the PeopleSoft Fluid User Interface, see *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.

The Theme Builder Guided Process involves the following three steps:

1. Define Theme

2. Assign Theme

3. Review and Publish

This document will take you through the pages involved in these steps.

The following terminology may be of use to understand the branding process:

• **Macro Set**: A PeopleTools 8.55 feature that allows users to update styling of fluid pages and fluid like header on classic pages.

• **Unpublished Theme**: A Theme definition (new or existing) that was left midway in the Theme Builder after clicking the Save button on the first step and not clicking the Publish button.

• **Default Macro Set**: This is the Oracle delivered Macro Set (PT_DEFAULT_MACROSET_855).

**Note:** The enhancements related to the Theme Builder Guided Process are made available to the PeopleSoft Interaction Hub release 9.1. These enhancements use the Macroset definitions and Activity Guide Framework delivered in PeopleTools 8.55.

For more information on Macro Sets, see *PeopleTools: Portal Technology*, Administering System Branding.

To use the Theme Builder, it is important that you have the right roles. The two roles described below helps you access and work with the process:

- Theme Builder User (PAPP_THEME_BUILDER_USER) – This role has access to the Theme Builder Guided Process. When a user with this role publishes a change, this triggers an email to the Theme Builder Administrator for approval.

- Theme Builder Administrator (PAPP_THEME_BUILDER_ADMIN) – This role grants access to Theme Builder Guided Process, Theme Builder Installation and Theme Builder Advanced Settings. This role approves the Theme changes submitted by a Theme Builder User.

## Pages Used to Access and Set Up the Theme Builder Guided Process

| Page Name | Definition Name | Usage |
|---|---|---|
| Theme Builder Tile | PAPP_EPPBR_AGSRCH_FL_GBL <br><br> (this is the cref for the tile) | Tap this tile to access the Themes Builder page to update an existing theme or create a new theme. |
| Theme Builder Page | EPPBR_BRANDING_FL | To view all the Themes defined in the system. |
| Define Theme Page | EPPBR_AG_DEFTHM_FL | To specify the values for basic theme attributes. |
| Assign Theme Page | EPPBR_AGASGNTHM_FL | To turn on the Portal Default or assign themes to user attributes like Permission lists, Roles, etc. |
| Review and Publish Page | EPPBR_AGPUBLISH_FL | To apply the Theme changes to the current system only and create ADS files to update clustered systems. |

## Theme Builder Tile

Use the Theme Builder tile (PAPP_EPPBR_AGSRCH_FL_GBL) to access the Theme Builder page from where the user can either update an existing theme or create a new theme.

Navigation:

The Theme Builder tile is available in the Hub Administrator folder. You can add this tile to any of the Homepages using the Personalize function.

This example illustrates the Hub Administrator landing page with the Theme Builder Tile.
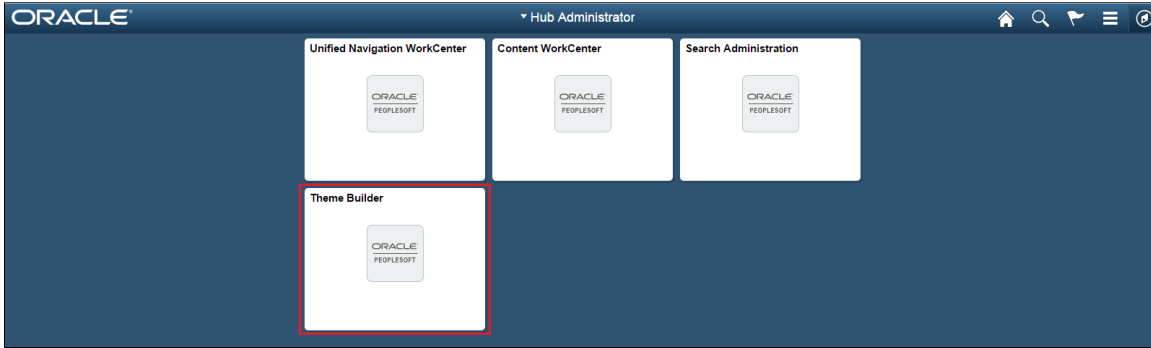


# Theme Builder Page

Use the Theme Builder page (EPPBR_BRANDING_FL) to view all the Branding Themes defined in the system. You can tap one of the themes to select it or tap the Create Theme button to create a new theme.

Navigation:

- Tap the Theme Builder tile to access the Theme Builder page.

- **Portal Administration** > **Theme Builder** > **Theme Builder**

This example illustrates the fields and controls on the Theme Builder page. You can find definitions for the fields and controls later on this page.
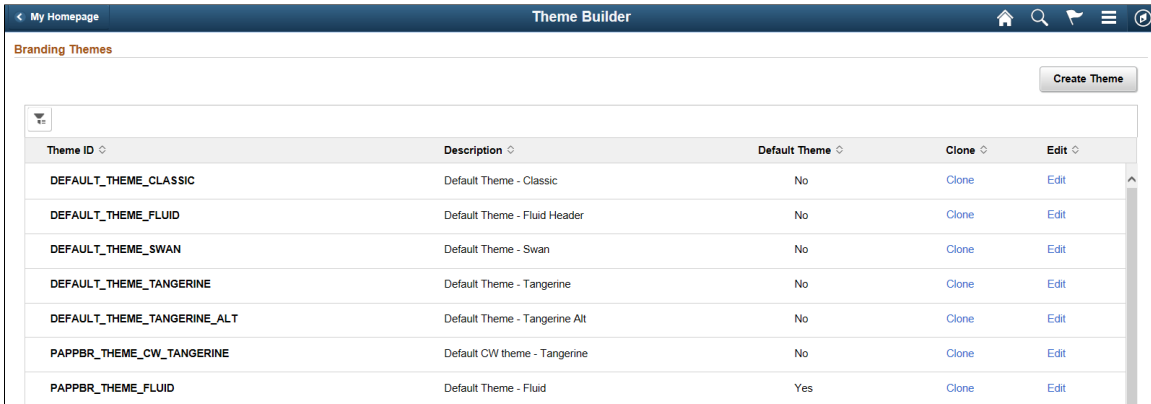


| Field or Control | Description |
|---|---|
| **Create Theme** | Use the **Create Theme** button to create a new theme.<br><br>Tap the **Create Theme** button. You can specify the name and description of the new theme and tap the Continue button. The Theme Builder gets launched with the defaults based on the default Macroset. |
| **Theme ID** | Displays all the themes defined in the system. |

| Field or Control | Description |
|---|---|
| **Default Theme** | Displays if a theme is set as the default in the system. |
| **Clone** | Use the **Clone** link to clone any existing theme.<br><br>Tap the **Clone** link next to theme you wish to clone. The Clone Theme modal window opens. There you can specify the name and description of the new theme. |
| **Edit** | Tap the **Edit** link next to a theme to make any changes to it.<br><br>The Theme Builder gets launched to help you change the values of the attributes of the theme. |

# Define Theme Page

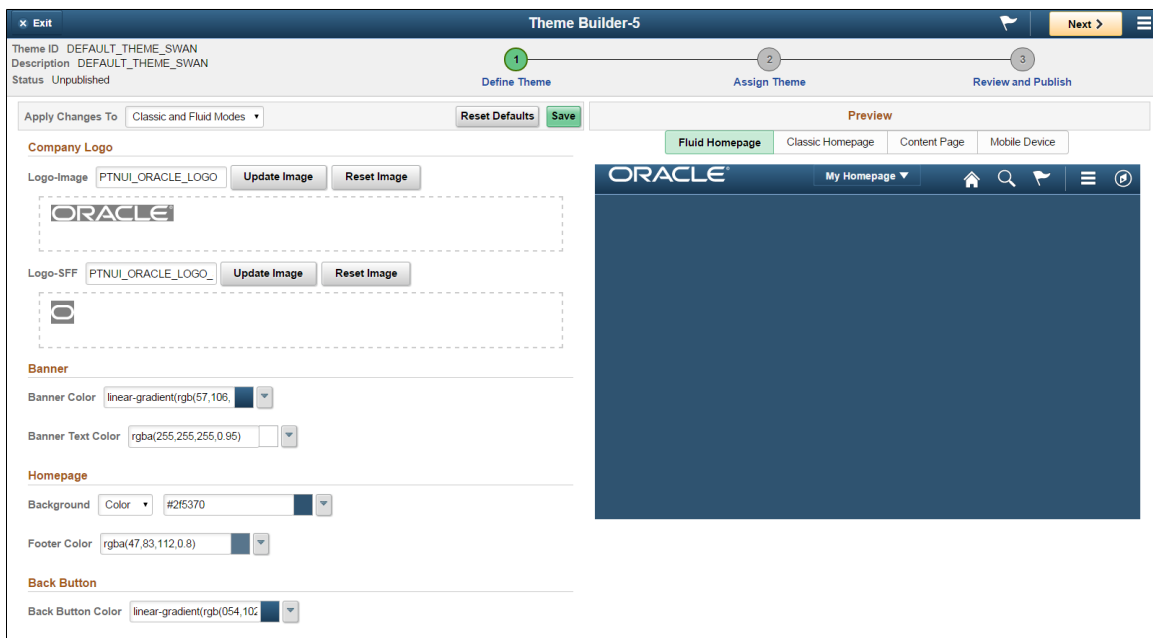Use the Define Theme page (EPPBR_AG_DEFTHM_FL) to specify values for basic theme attributes.

Navigation:

Tap the Branding tile to access the Branding Themes page. Tap the **Create Theme** button or the Edit link next to a Theme to navigate to the Define Theme page.

This example illustrates the fields and controls on the Define Theme page. You can find definitions for the fields and controls later on this page.

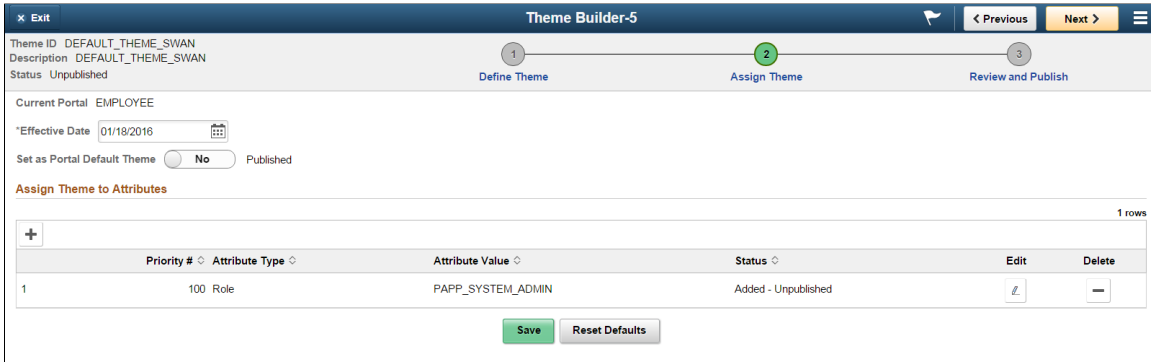| Field or Control | Description |
| --- | --- |
| Apply Changes To | Select the modes to which you wish to apply the changes. The options include:<br><br>•    Classic and Fluid Modes<br><br>•    Fluid Mode Only<br><br>**Note:** The **Apply Changes To** field is displayed only when you select a theme that has a classic header. |
| Reset Defaults | Tap this button to reset the theme to the default values. |
| Save | Tap this button to save the changes to the theme. |
| Logo-Image | Tap the Update Image button to change the image. If you tap the Reset Image button, then the image set as the default loads. |
| Banner Color and Banner Text Color | You can tap the drop-down button next to these fields to choose the color for the Banner and Banner text using a color picker. |
| Background | Select the image to set as the background. |
| Footer Color | You can tap the drop-down button next to these fields to choose the color for the Footer using a color picker. |
| Back Button Color | You can tap the drop-down button next to these fields to choose the color for the Back button using a color picker. |

## Assign Theme Page

Use the Assign Theme page (EPPBR_AGASGNTHM_FL) to turn on the Portal Default or assign themes to user attributes like Permission lists, Roles, etc.

Navigation:

Tap step 2, Assign Theme, at the top of the page to navigate to the Assign Theme page in the guided process.

This example illustrates the fields and controls on the Assign Theme page. You can find definitions for the fields and controls later on this page.



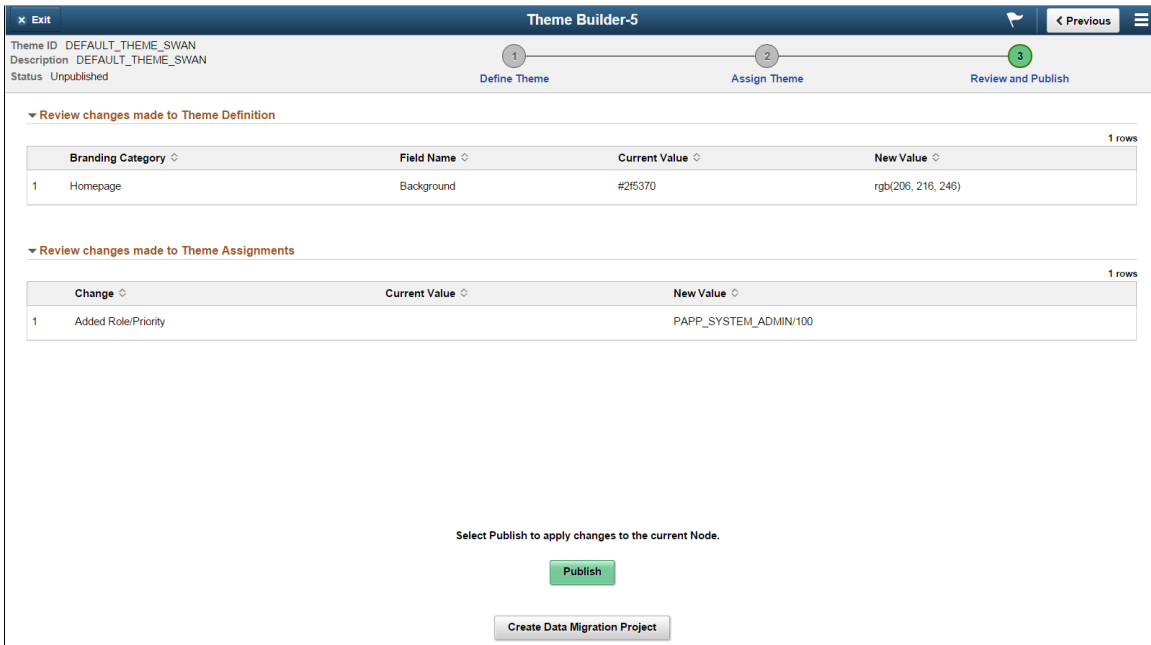| Field or Control | Description |
| --- | --- |
| **Effective Date** | Enter the data from which you want the theme changes to take effect. |
| **Set as Portal Default Theme** | If you want to set the current theme as the portal default, choose the option **Yes**. |
| **Add button** | Tap the **Add** button to open the Assign Theme to Attribute modal window. Here you can select an attribute type, value and priority. Click the **Review Priorities of Current Theme Assignments in the System** heading to view the current theme assignments in the system. |

## Review and Publish Page

Use the Review and Publish page (EPPBR_AGPUBLISH_FL) to apply the Theme changes to the current system only and create ADS files to update clustered systems.

Navigation:

Tap step 3, Review and Publish, at the top of the page to navigate to the Review and Publish page in the guided process.

This example illustrates the fields and controls on the Review and Publish page. You can find definitions for the fields and controls later on this page.



| Field or Control | Description |
|---|---|
| **Publish** | Tap the **Publish** button to apply the theme changes to the current system only. |
| **Create Data Migration Project** | Tap this button to create a Data Migration Workbench project that includes the selected theme definitions.

Tapping this button opens the Create Data Migration Project page (PTBR_CREATE_ADS), which enables you to create a Data Migration Workbench project to migrate theme data to another system.

**Note:** A Data Migration Project Workbench project is also referred to as an Application Data Set (ADS). |

**Note:** Please remember to clear cache after publishing all Theme changes.

## Related Links

Understanding the Theme Builder Advanced Setting
Understanding the Theme Builder Installation

# Understanding the Theme Builder Advanced Setting

The Theme Builder Advanced Setting enables you to update and publish all the available branding elements in the system. The Advanced Setting allows you to customize color schemes, images and text used in the Branding categories such as Activity Guide, Back button, side panels, etc.

Only a select few of these categories are available in the Define Theme step of the Theme Builder Guided Process.

*Warning!* Please use extreme caution when making changes to the delivered advanced settings. Many of these settings are inter-related and hence changing one may bring about undesirable changes in the related attributes. If you run into trouble while changing these settings, discuss it with your PeopleSoft consultant.

## Page used to set up Theme Builder Advanced Setting

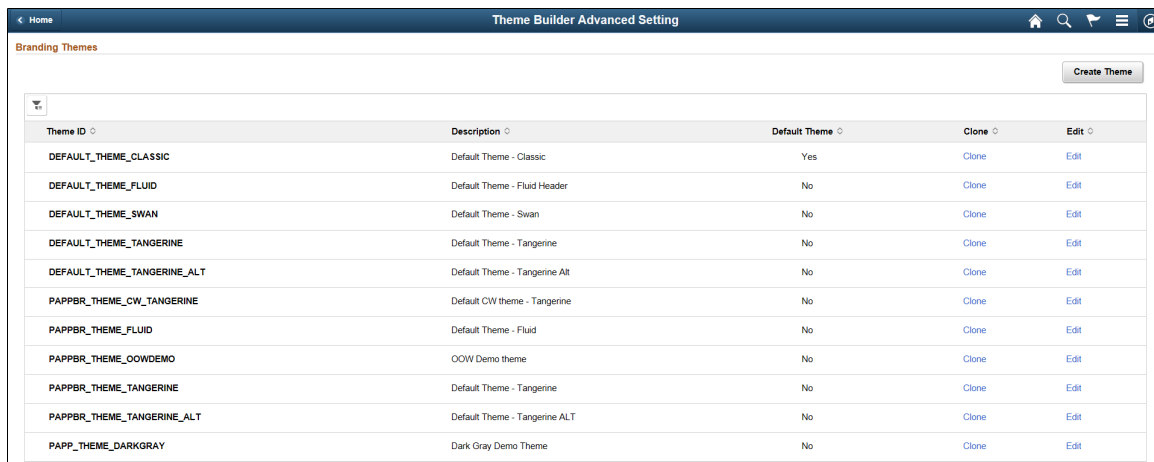| Page Name | Definition Name | Usage |
|---|---|---|
| Branding Themes Page | EPPBR_BRANDING_FL | To update and publish all the available branding elements in the system. |

## Branding Themes Page

Use the Branding Themes page (EPPBR_BRANDING_FL) to update and publish all the available branding elements in the system.

Navigation:

**Portal Administration** > **Theme Builder** > **Theme Builder Advanced Setting**

This example illustrates the fields and controls on the Branding Themes page.



### Related Links

Managing the Theme Builder Guided Process

# Understanding the Theme Builder Installation

The Theme Builder Installation component enables to control the Approval functionality and to categorize the complete list of macros delivered as a part of PeopleTools 8.55. This is delivered as system data.

## Pages Used to Set Up the Theme Builder Installation

| Page Name | Definition Name | Usage |
|---|---|---|
| Theme Builder Install Page | EPPBR_AGINSTALL | To enable/disable the Approval functionality. |
| Theme Builder Attributes Page | EPPBR_MACROCAT | To define categories and attributes for various Branding elements. |

## Theme Builder Install Page

Use the Theme Builder Install page (EPPBR_AGINSTALL) to enable/disable the Approval functionality.

Navigation:

**Portal Administration** > **Theme Builder** > **Theme Builder Installation**

This example illustrates the fields and controls on the Theme Builder Install page. You can find definitions for the fields and controls later on this page.
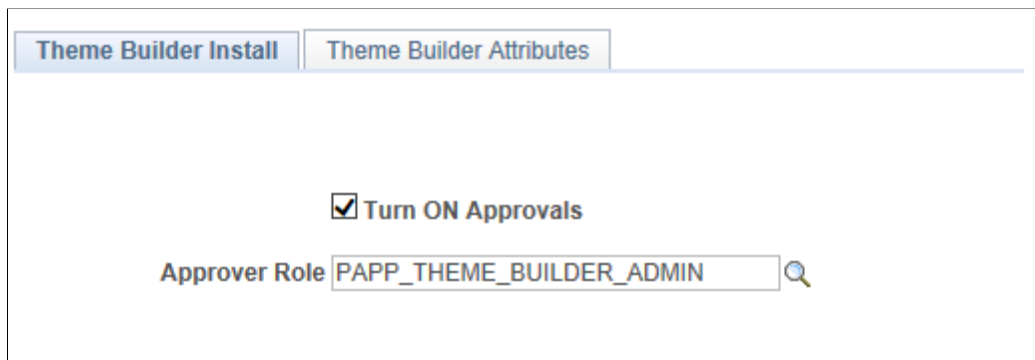


| Field or Control | Description |
|---|---|
| **Turn ON Approvals** | Click the checkbox to turn on the Approval functionality. <br><br> If the Approval functionality is turned on, then clicking the **Publish** button on the Review and Publish page in the Theme Builder Guided Process triggers an email to the approver. |

| Field or Control | Description |
|---|---|
| **Approver Role** | You can select the approver to whom the approval email is triggered. |

# Theme Builder Attributes Page

Use the Theme Builder Attributes page to define categories and attributes for various Branding elements.

*Warning!* The Theme Builder Attributes page holds system data and we do not recommend making changes to these settings. If you want more information on this, please contact your PeopleSoft consultant.

Navigation:

**Portal Administration** > **Theme Builder** > **Theme Builder Installation** > **Theme Builder Attributes**

This example illustrates the fields and controls on the Theme Builder Attributes page. You can find definitions for the fields and controls later on this page.
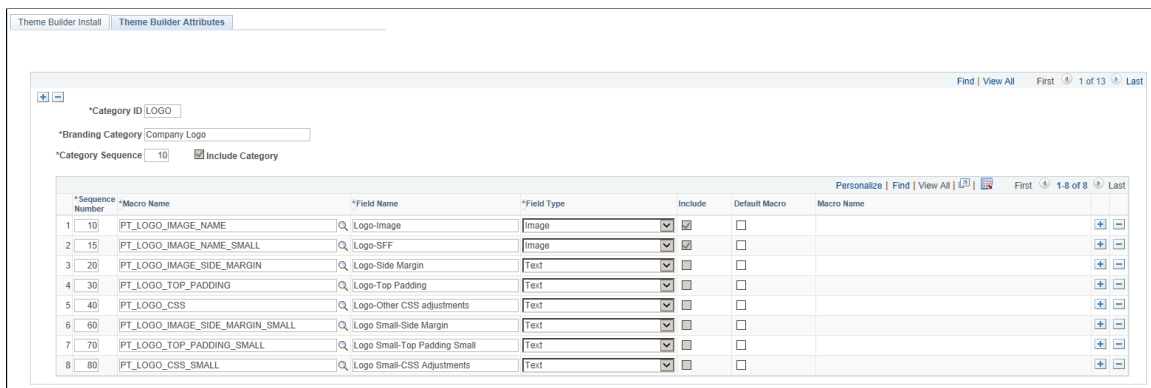


| Field or Control | Description |
|---|---|
| **Category ID** | Enter a new Category ID. |
| **Branding Category** | Enter a description for the newly added Category. |
| **Category Sequence** | Specify a sequence number for the Category. |
| **Include Category** | This is a display only field. If this checkbox appears selected, it means that the Define Theme page is dynamically loaded with all the attributes that are marked as '**Include**' in this Category. |
| **Sequence Number** | Enter the sequence number for the attribute. |

| Field or Control | Description |
|---|---|
| **Macro Name** | Select the macro set. |
| **Field Name** | Enter a meaningful field name to the macroname. |
| **Field Type** | Field Type can have one of the following values:<br><br>• **Color Picker**: For selecting a single color on the Define Theme and Advanced Setting pages.<br><br>• **Gradient Picker**: For selecting a gradient on the Define Theme and Advanced Setting pages.<br><br>• **Image**: For uploading an image on the Define Theme page.<br><br>• **Image Color Picker**: For selecting an image color on the Define Theme page.<br><br>• **Image\Gradient Picker**: For selecting an image or a gradient picker on the Define Theme page.<br><br>• **Text**: For selecting the text position, dimension etc. |
| **Include** | This is a display only field. All attributes displayed as selected are dynamically loaded on the Define Theme page. |
| **Default Macro** | Select the checkbox to set another macro as the default. |
| **Macro Name** | When the **Default Macro** checkbox is selected, this field is activated and you can choose the macro to be set as the default. |

**Note:** For more information on Macro sets, see *PeopleTools: Portal Technology*, Administering System Branding.

## Related Links

Managing the Theme Builder Guided Process
Understanding the Theme Builder Advanced Setting