
PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding

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PeopleSoft Enterprise Portal Preface

This preface discusses:

- About PeopleSoft Enterprise Portal.
- Using this PeopleBook.
- Related PeopleBooks.
- PeopleBooks and the PeopleSoft Online Library.

About PeopleSoft Enterprise Portal

This section discusses:

- PeopleSoft Portal Solutions product family.
- PeopleSoft Enterprise Portal feature overview.
- PeopleSoft Enterprise Portal and PeopleTools.

PeopleSoft Portal Solutions Product Family

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

- PeopleSoft Enterprise Portal.
- PeopleSoft Community Portal.
- PeopleSoft Enterprise Internal Controls Enforcer.

PeopleSoft Enterprise Portal

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

PeopleSoft Enterprise Portal 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.

PeopleSoft Enterprise Portal 9.1 provides these important new features:

- Blogs.
- Feed publishing.

- Related content services—specifically, the Related Discussion service, the Related Links service, and the Related Tags service.
- Tagging (also known as social bookmarking).
- Wiki content.

These new features add to the existing features already present in PeopleSoft Enterprise Portal:

- Action items
- Collaborative workspaces
- Community calendars
- Context Manager
- Discussion forums
- Document management
- Polls and surveys
- Resource Finder
- Searches and saved searches

See "[PeopleSoft Enterprise Portal Preface](#)," [PeopleSoft Enterprise Portal Feature Overview](#), page xi.

PeopleSoft Community Portal

Oracle's PeopleSoft Community Portal joins PeopleSoft Enterprise Portal as an option for creating a portal experience using the PeopleSoft Portal Solutions product family.

PeopleSoft Community Portal has the same collaborative features and functions as PeopleSoft Enterprise Portal. However, with PeopleSoft Community Portal, you are limited to creating and managing a maximum of three sites. With PeopleSoft Enterprise Portal, you can create and manage an unlimited number of sites.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "PeopleSoft Community Portal."

PeopleSoft Enterprise Internal Controls Enforcer

Oracle's PeopleSoft Enterprise Internal Controls Enforcer is designed to automate and enforce internal controls required under Section 404 of the Sarbanes-Oxley Act. Using the product's monitoring and diagnostic capabilities, you can reduce the cost of complying with the new regulations and the risk of unforeseen changes in internal controls. PeopleSoft Enterprise Internal Controls Enforcer will work in conjunction with other PeopleSoft corporate governance solutions to make the entire compliance process repeatable and auditable, allowing you to focus on running your business.

In addition, the product enables you to continuously track and monitor controls, and, optionally, certify their effectiveness at interim times throughout the year to support certifications that are required for Section 302 of Sarbanes-Oxley.

See *PeopleSoft Enterprise Internal Controls Enforcer 9.1 PeopleBook*.

PeopleSoft Enterprise Portal Feature Overview

Two key characteristics distinguish PeopleSoft Enterprise Portal as a rich Web 2.0 platform:

- First, PeopleSoft Enterprise Portal is a traditional portal framework that can be used for aggregating and managing content.
- Second, its collaborative capabilities make PeopleSoft Enterprise Portal a functional application that complements the features found in PeopleSoft applications.

PeopleSoft Enterprise Portal is built on the same architecture and with the same tools as PeopleSoft applications. This provides native integration and single sign-on with PeopleSoft applications. Because PeopleSoft Enterprise Portal is built on the PeopleTools platform, these core characteristics are also available in your portal implementations:

- Branding.
- Common toolset across all PeopleSoft applications.
- Database, application server, and web server independence.
- Feed Publishing Framework.
- Related Content Framework.
- Rich text editor.
- Role-based security and access management.
- Single sign-on.
- SOA support through Integration Broker.

Combined with pre-built application content delivered as PeopleSoft application portal packs, these features make configuration and deployment of PeopleSoft Enterprise Portal for a PeopleSoft-rich environment much easier than with other portals.

PeopleSoft Enterprise Portal provides numerous collaboration and Web 2.0 features such as blogs, content management, discussion forums feeds, tagging, collaborative workspaces and others. Each of these features is discussed briefly in this section.

Action Items

Miscellaneous to-do's and issues are frequently assigned during project status meetings and in workspaces. Successful resolution of these detailed action items is critical to meeting broader business objectives. PeopleSoft Enterprise Portal provides an action items feature that helps project leaders track open action items assigned to various team members as well as capture their resolution for a given project.

Blogs

Blogs (or weblogs) are a familiar and useful means for authoring and broadcasting information for an individual or team. Blogs are also participatory in that they allow for commentary and feedback from the audience. In PeopleSoft Enterprise Portal, blogs are integrated with other features such as feeds, notifications, search, tagging, and workspaces.

Branding

A WYSIWYG interface allows branding administrators to define and deploy header and footer elements for the portal. Because branding is integrated with site management as well as collaborative workspaces, subject matter experts can override these branding elements locally, making it easier for non-portal experts to create compelling sub-communities within the portal.

Calendars

In PeopleSoft Enterprise Portal, calendars allow communities to manage events within portals, sites, and workspaces. Individual communities or workgroups can maintain their own distinct calendars. Users can subscribe to any or each of the calendars to which they have access and display the results as a unified calendar on their homepage or within a workspace.

Collaborative Workspaces

A collaborative workspace is a virtual team room. Workspaces can be created to facilitate the completion of any project that requires a team to work collaboratively to accomplish its goals. Some collaborative projects focus on temporary issues that require short, intense collaborative sessions, such as closing a sales deal or an open problem incident. Other projects may be ongoing, such as coordinating the work for a department.

In PeopleSoft Enterprise Portal, collaborative workspaces incorporate the product's other collaborative features including action items, blogs, calendars, discussions, documents, feeds, polls, search, tagging, and wikis. In addition, workspaces can be contextually linked to PeopleSoft application pages to provide robust collaboration in the context of transactions and business processes.

Content Management

PeopleSoft Enterprise Portal's content management system enables you to organize all your content creation processes. The content management system helps you to manage, create, and organize content, through approval, version management, and publication features. The resulting content is ready and available for browsing by users and for reuse in portal pagelets, news publications, related information, and workspaces. Content migration allows you to author content in a staging database and then migrate the finalized content to a production database.

Context Manager

In PeopleSoft Enterprise Portal, Context Manager appears as a frame on the right side of the page displaying pagelets that are loaded with appropriate information based on the target page or transaction. Context Manager is the framework within which features—such as, related information, related contacts, related resources, related discussions, related workspaces, related links, and content ratings—operate. PeopleSoft Enterprise Portal also delivers related content services to provide PeopleSoft Enterprise Portal features on any PeopleSoft application pages.

See "[PeopleSoft Enterprise Portal Preface, Related Content Services, page xiii](#)."

Discussion Forums

Discussion forums provide a platform that groups can use to discuss topics of interest. Participants can post discussion topics, such as issues, suggestions, or questions, and receive replies and feedback. In PeopleSoft Enterprise Portal, discussion forums are integrated with other features such as action items, alerts, documents, feeds, notifications, search, tagging, and workspaces. Standalone forums within a portal or site can be managed as moderated or unmoderated.

Feed Publishing and Consumption

PeopleSoft Enterprise Portal leverages the PeopleTools Feed Publishing Framework to deliver feeds for several features including blogs, discussion forums, news publications, and workspaces. You can use the framework to publish secure or public feeds. These feeds make it easy for people to subscribe to information that interests them, rather than logging into the application that delivers this information. PeopleSoft Enterprise Portal also provides pagelets and features that facilitate the discovery and consumption of internal and external feeds.

My Links

My Links functionality provides an easy way for to bookmark your most frequently needed and accessed content. My Links serves as a collection of bookmarks to specific PeopleSoft Enterprise Portal pages, to PeopleSoft transactions, and to non-PeopleSoft content such as external websites.

Polls and Surveys

PeopleSoft Enterprise Portal provides polls as a simple way to gather opinions and comments from portal users using a pagelet that is displayed on the portal or site homepage, in a workspace, or attached to a menu item. While polls cover a single question only, surveys allow you to create and distribute questionnaires and evaluate the responses.

Related Content Services

The PeopleTools Related Content Framework provides the tools for subject matter experts or portal administrators to contextually link application pages with collaborative content provided as related content services. PeopleTools provides the service definitions for three PeopleSoft Enterprise Portal related content services:

- Related Discussion service
- Related Links service
- Related Tags service

These related content services provide features of PeopleSoft Enterprise Portal that can be added to PeopleSoft application pages through the framework. While the service definitions are provided in PeopleTools, an installed PeopleSoft Enterprise Portal database is required to provide the services and to store the related data.

Resource Finder

Resource Finder is a highly flexible repository that you can configure to receive data loads containing information about any organizational resource, along with links that relate these resources to each other. These resources are typically things like customers, suppliers, employees, departments, locations, companies, and business units, but can also be easily expanded to include things like products and projects, for example.

Search

In PeopleSoft Enterprise Portal, searches can be executed from the portal header, from within specific features, and via saved searches. From the portal header and the search page, searches can be scoped or limited to specific types of content. Because tags are integrated into search indexes, search results improved based on user tagging. Integration with Oracle's Secure Enterprise Search (SES) exposes PeopleSoft Enterprise Portal content to external systems via web services.

Tags

Tags, also known as social bookmarks, provide the means for users to store, organize, search, and manage content bookmarks in PeopleSoft Enterprise Portal. Tagging increases the probability of properly characterizing the content and hence its discovery and use. In PeopleSoft Enterprise Portal, tagging is integrated directly with other content types including blogs, collaborative workspaces, content management system items, and discussion forums. In addition, the tagging framework is available through the Related Tags service and to non-PeopleSoft applications as a web service.

Third-Party Integration

PeopleSoft Enterprise Portal supports integration with:

- Calendar servers: Lotus Domino or Microsoft Exchange 2003 and 2007.
- Email servers: IMAP, Lotus Domino, Microsoft Exchange 2003 and 2007, or POP.
- Instant messaging domains: GTalk, Sametime, XMPP, or Yahoo.
- Oracle Secure Enterprise Search (SES).

Wikis

Wikis support the collaborative authoring needs of portal users. In PeopleSoft Enterprise Portal, wikis are available in collaborative workspaces, which means that the security controls of workspaces apply to wikis. Wikis incorporate the easy to use rich text editor and other features to provide a collaborative authoring environment.

User Interface Features

The PeopleSoft Enterprise Portal user interface relies on these features and others from PeopleTools:

- AJAX features such as modal dialog boxes, drop-down menu navigation, and partial page and pagelet refreshes.
- Branding updates incorporating the SWAN style sheet.

- Menu bread crumbs.
- Pagelet drag-and-drop.
- Pagelet Wizard pagelets with help and search.

PeopleSoft Enterprise Portal and PeopleTools Portal Technology

To understand the functionality of PeopleSoft Enterprise Portal, Oracle recommends that you familiarize yourself with PeopleTools, focusing especially on the PeopleBooks and chapters that are devoted to portal functionality. Because PeopleSoft Enterprise Portal builds upon the basic internet architecture that is delivered with PeopleTools, this information gives you an excellent foundation of knowledge upon which the PeopleSoft Enterprise Portal suite of PeopleBooks 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 Enterprise HRMS or Oracle's PeopleSoft Enterprise 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 ability, content management, navigation, and homepage personalization.

PeopleTools PeopleBooks cover the PeopleSoft Pure Internet Architecture and PeopleTools portal technology in detail.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*.

Using this PeopleBook

This section discusses:

- About this book.
- Common elements used in PeopleSoft Enterprise Portal.

About this Book

This PeopleBook comprises the following chapters:

- PeopleSoft Enterprise Portal Branding Overview
See [Chapter 1, "PeopleSoft Enterprise Portal Branding Overview," page 1.](#)
- Navigating in PeopleSoft Enterprise Portal Branding
See [Chapter 2, "Navigating in PeopleSoft Enterprise Portal Branding," page 3.](#)

- Understanding PeopleSoft Enterprise Portal Branding — this chapter discusses the various elements of branding, what can and cannot be branded, and a brief discussion of the differing methods of branding.
See [Chapter 3, "Understanding PeopleSoft Enterprise Portal Branding," page 5.](#)
- Reviewing PeopleSoft Enterprise Portal-Delivered Branding Themes
See [Chapter 4, "Reviewing PeopleSoft Enterprise Portal-Delivered Branding Themes," page 19.](#)
- Setting Up PeopleSoft Enterprise Portal Branding
See [Chapter 5, "Setting Up PeopleSoft Enterprise Portal Branding," page 37.](#)
- Understanding PeopleSoft Enterprise Portal-Delivered HTML Layouts
See [Chapter 6, "Understanding PeopleSoft Enterprise Portal-Delivered HTML Layouts," page 49.](#)
- Configuring and Assembling Branding Themes
See [Chapter 7, "Configuring and Assembling Branding Themes," page 61.](#)
- Previewing, Selecting and Assigning Branding Themes, Components, Images, and Style Sheets
See [Chapter 8, "Previewing, Selecting and Assigning Branding Themes, Components, Images, and Style Sheets," page 111.](#)
- Developing Custom Branding Themes
See [Chapter 9, "Developing Custom Branding Themes," page 117.](#)
- Understanding Branding Theme Development and Deployment
See [Chapter 10, "Understanding Branding Theme Development and Deployment," page 127.](#)
- Deploying Branding Themes
See [Chapter 11, "Deploying Branding Themes," page 135.](#)
- Running Branding Queries
See [Chapter 12, "Running Branding Queries," page 139.](#)

Common Elements Used in PeopleSoft Enterprise Portal

This section discusses the rich text editor.

About the Rich Text Editor

Many PeopleSoft Enterprise Portal features—including blogs, discussion forums, text/HTML content, wiki content, and others—employ the rich text editor.

The rich text editor provides editing and formatting capabilities for long edit boxes. It allows for the rich formatting of text content, including structural elements such as HTML tags and lists, formatting treatments such as bold and italic text, and drag-and-drop inclusion and sizing of images among other features. Moreover, the rich text editor tool bar is extensible by using a custom settings configuration file.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*, "Working With Pages," Working With Rich Text-Enabled Fields.

Related PeopleBooks

This section discusses:

- PeopleSoft Enterprise Portal PeopleBooks.
- PeopleTools PeopleBooks.

PeopleSoft Enterprise Portal PeopleBooks

The PeopleSoft Enterprise Portal PeopleBook library includes:

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*

This PeopleBook covers the branding feature, which enables you to apply various branding themes to the portal, portal sites, and collaborative workspaces to present multiple visual designs and deliver appropriate links for specific user audiences.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*

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

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*

This PeopleBook 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.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*

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

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*

This PeopleBook describes how to setup and use Resource Finder, a highly flexible repository that describes any organizational resource, along with links that relate these resources to each other.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*

This PeopleBook describes setup and usage of items such as blogs, calendars, discussion forums, feeds, tagging, searching, related content services, and other features of PeopleSoft Enterprise Portal.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

PeopleTools PeopleBooks

The PeopleTools 8.50 PeopleBook library contains the complete set of books covering PeopleTools 8.50. In particular, several of these books are useful to the setup, administration, and use of PeopleSoft Enterprise Portal including:

- *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*

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

- *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration*

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.

- *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*

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

- *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*

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

- *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*

This PeopleBook 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 and other PeopleBooks in the PeopleTools library are referenced as needed.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.

- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Chapter 1

PeopleSoft Enterprise Portal Branding Overview

This chapter provides an overview of Oracle's PeopleSoft Enterprise Portal branding feature and other presentation technologies:

Understanding the PeopleSoft Enterprise Portal Branding Feature

The PeopleSoft Enterprise Portal branding feature enables you to apply various branding themes to the portal, portal sites, and collaborative workspaces to present multiple visual designs and deliver appropriate links for specific user audiences.

Because branding themes can be applied based on portal registry, site, or user role, using the PeopleSoft Enterprise Portal branding feature enables you to meet your portal needs by deploying a single enterprise portal database. This provides the benefit of sharing a common IT infrastructure, as well as a large quantity of unstructured content.

Other features of PeopleSoft Enterprise Portal branding enable you to:

- Create your own layouts and incorporate them into the administrative pages.
- Store and maintain multiple themes and their component parts.
- Allow non-technical users to assemble themes and configure images, links, text, and styles.
- Configure images and style classes for menus.
- Leverage predefined HTML layouts for theme parts, like headers and footers.
- Maintain precedence role lists for applying themes.
- Move themes from development to production.

Understanding Other Presentation Technologies

This section provides overviews of additional PeopleSoft tools and technologies that you can use to impact the presentation of enterprise portals and portal sites. This section discusses:

- Personalizing and administering homepages.
- Configuring homepage and pagelet objects.

- Designing portal templates.
- Creating and modifying style sheets and style classes.

Personalizing and Administering Homepages

As a portal end user, you can personalize your homepage by determining the pagelets that appear on each tab of the homepage. You can also determine the homepage layout, and specify whether to display pagelets in a two- or three-column layout. You can also set other personalizations, such as set your password, add words to your personal dictionary, and more.

As a portal administrator, you can administer homepage definitions by creating multiple tabbed homepages that are secured to the appropriate users. For each tab, you can select which pagelets are available for users and designate whether the pagelets are required or optional on the tab. For required and defaulted pagelets, you can designate their position in the layout.

Configuring Homepage and Pagelet Objects

PeopleSoft uses fixed-named HTML and image objects to build portal homepages. Using the portal registry's content reference attribute fields, you can add overriding HTML objects and images for use with particular tabs and pagelets to alter their look for your presentation requirements.

Designing Portal Templates

PeopleSoft portal technology integrates content from numerous sources and presents the merged content on a single Web page in a coherent, consistent fashion that keeps users within the portal framework. A portal template tells the portal servlet what content to place on the assembled page and where each piece of content should be placed.

You can design dynamic or static, page-based or a frame-based templates to meet your business requirements.

Creating and Modifying Style Sheets and Style Classes

A style sheet is a definition, like any PeopleTools object definition, that you create in Application Designer. It is a standalone object definition that you can upgrade, delete, rename, and so on. It is a collection of formatting style classes, each of which can be applied to page display controls.

You can create and modify style classes to control a broad range of characteristics, including font size, spacing, alignment, border width, weight, and color.

Style sheets enable you to change the formatting of many page attributes across multiple pages quickly and easily

Chapter 2

Navigating in PeopleSoft Enterprise Portal Branding

This chapter discusses Oracle's PeopleSoft Enterprise Portal branding navigation.

Navigating in PeopleSoft Enterprise Portal Branding

The PeopleSoft Enterprise Portal branding feature provides a custom navigation page that contains groupings of folders that provide access to activities, based on your security and privileges. If you do not have privileges for certain activities using PeopleTools security administration, the links to those activities are not displayed on the custom navigation page.

Note. In addition to the PeopleSoft Enterprise Portal branding custom navigation pages, Oracle provides menu navigation and standard navigation pages.

Pages Used to Navigate in PeopleSoft Enterprise Portal Branding

The following table describes the pages that are used to navigate in PeopleSoft Enterprise Portal branding.

<i>Page Name</i>	<i>Navigation</i>	<i>Usage</i>
Branding Home	Portal Administration, Branding Center The Branding Center is also a homepage pagelet.	Access primary branding menu options and activities.
Review Designs	Portal Administration, Branding Center, Designs, Review Designs	Review the delivered headers, footers and html layouts.
Identify Images	Portal Administration, Branding Center, Designs, Identify Images	Identify Images Identify the images required for your theme's header and footer. Upload them into the Image Catalog using Application Designer, or access them directly from with a URL.
Identify Styles	Portal Administration, Branding Center, Designs, Identify Styles	View informational text about identifying and selecting styles for branding themes.

Page Name	Navigation	Usage
Assemble Themes	Portal Administration, Branding Center, Definitions, Assemble Themes	Define headers and footers, including adding your own images and links. Designate site overridable elements. Assemble themes for use by specific roles or sites.
Assign Themes	Portal Administration, Branding Center, Definitions, Assign Themes In Collaborative Workspace, select Administration, Advanced Tab, Branding, Assign Themes	Assign branding theme display according to the logged in user's security roles.
Override Homepage Header	On a site, select Site Manager Center, Site Branding, Override Homepage Header In a Collaborative Workspace select Administration, Advanced tab, Branding, Override Homepage Header	Override branding values for the site's homepage header
Override Target Page Header	On a site, select Site Manager Center, Site Branding, Override Target Page Header In a Collaborative Workspace select Administration, Advanced tab, Branding, Override Target Page Header	Override branding values for the site's target page header.
Override Homepage Footer	On a site, select Site Manager Center, Site Branding, Override Homepage Footer In a Collaborative Workspace select Administration, Advanced tab, Branding, Override Homepage Footer	Override branding values for the site's homepage footer.
Definitions	Portal Administration, Branding Center, Definitions	Enable the branding feature, assign site overridable elements, and set up your HTML layout.
Queries	Portal Administration, Branding Center, Queries On a site, select Site Manager Center, Site Branding, Branding Queries In a Collaborative Workspace select Administration, Advanced tab, Branding, Branding Queries	Run queries that provide lists of branding design data, site assignments and theme assignments.

Chapter 3

Understanding PeopleSoft Enterprise Portal Branding

This chapter discusses:

- Branding uses
- Branding components
- Items you can brand
- Branding methods
- Items you cannot brand
- Branding across remote nodes

Understanding Branding Uses

A *brand* is a trademark or distinctive name that identifies a product or a manufacturer. You can extend the concept of brand to create distinctive Web site designs for your company. Oracle's PeopleSoft Enterprise Portal provides you with the ability to quickly implement a portal with your own "look and feel," or branding.

PeopleSoft Enterprise Portal ships with twelve predefined branding themes. You can use these themes as they are and apply your own images, text, links and more to match the needs of your audience. You can also create your own themes.

You can apply branding themes based on portal registry, site, or user role. PeopleSoft Enterprise Portal branding is useful for:

- Any portal that faces multiple audiences and requires a different look for each.

You can use branding themes for your company's primary Web site by using a single portal database to present different user experiences and deliver centrally managed content appropriate for each user group.

For example, a company can use branding to provide different user experiences for the general public, customers, suppliers, job applicants, prospective customers, and partners. A university system can use branding to provide different user experiences for campuses, students, faculty and alumni.

The homepage header images and links can be different for each user group, thereby delivering an experience designed especially for their needs. For example, you could create a guest theme for public or general Web traffic, and then once a user logs on, the user's assigned role could drive a different theme.

- Reducing costs.

PeopleSoft Enterprise Portal branding saves the development costs of creating separate Web sites and portals. PeopleSoft Enterprise Portal branding enables you to run one portal database and share a common IT infrastructure, and thereby enables you to save the development costs of creating separate Web sites and portals. You can support different themed experiences for user groups, thereby leveraging IT personal and hardware resources. Moreover, you can delegate theme creation and administration away from IT and development personnel to less-costly resources who better understand user populations and can configure and assign themes.

- Ensuring standardization among department intranet sites.

Intranet sites likely need to follow general corporate design standards. With PeopleSoft Enterprise Portal branding, sites created with PeopleSoft Enterprise Portal Site Management can inherit a basic design, yet override key elements, such as logos and header links.

Understanding Branding Components

This section discusses the components and terminology used in PeopleSoft Enterprise Portal branding.

Stylesheets

The user homepage usually includes a header, footer, menu navigation pagelet, and a few homepage pagelets. There are several stylesheet references when the homepage is generated. They are applied in the following sequence:

1. Stylesheet specified for the homepage pagelets, if any of the displaying homepage pagelets is an iPage.
This is set in the page properties in Application Designer.
2. Stylesheet defined in the Define Menu Styles component, if the PeopleSoft Enterprise Menu pagelet is on the homepage.
3. Stylesheet defined for the PeopleTools standard header.
4. Stylesheet defined in the theme definition.

You can have conflicting style classes within all of these stylesheets used in the template. For example, if you have a style class named `MY_STYLE_CLASS` in the first stylesheet and also have a style class named `MY_STYLE_CLASS` in the fourth stylesheet, there may be conflicting styles in the resulting homepage. Because the conflicting styles are defined at the same level, the one applied later in the sequence takes precedence.

In the homepage template, the stylesheet specified in the branding theme definition always takes precedence over competing stylesheets. For example, `PSPAGE` in the stylesheet `EPPSTYLEDEF` includes two pixels for the left margin. To override the left margin, `PSPAGE` is included in the blue theme stylesheet `EPPBRBLUESTYLEDEF`, but the left margin has been changed to zero.

You can also have conflicting styles in your target content template. In a page-based template, the stylesheet associated with the page used for the target content always takes precedence over competing stylesheets. In a frame-based template, the stylesheet specified in each frame takes precedence for the content within the frame.

In addition to the specifics mentioned here, all the rules of inheritance and conflicting styles of cascading stylesheets still apply. Keep your custom stylesheet definition as clean as possible and include only the style classes needed to avoid style conflicts.

See *Enterprise PeopleTools 8.50 PeopleBook: Application Designer Developers Guide*, "Creating Style Sheet Definitions."

Reviewing Branding Themes

A *branding theme* is a compilation of HTML, text, images, style classes and other objects that, when assigned to a portal, provides a distinct portal "look and feel." Changing a theme can be as simple as changing the logo displayed in the header HTML, or selecting a different style sheet to change the color scheme or text font. It can also be as complex as replacing delivered PeopleSoft objects to create new custom-built designs.

Themes contain a set of styled objects including:

- Homepage and target page headers.
- Homepage footer.
- Style sheet.
- Menu style.

Multiple predefined themes are delivered for headers, footers, HTML Layouts, menu styles and style sheets, so you can perform test configuration right out of the box.

As delivered, the theme that is active depends on your user role (for example the System Administrator role should default to the theme PAPPBR_THEME_PT_SWAN) and is considered the default theme for any active portal registries in the database. If desired, you can define multiple themes and then assign them to appear based on a hierarchy of user role precedence, portal name, or sites. Each theme and its components carry effective dating, which allows work-in-progress and the staging of future changes to coexist with actively deployed themes.

If none of the existing theme parts meet the branding needs of your organization, you can create and implement your own. PeopleSoft Enterprise Portal branding does not provide the interfaces for a non-programmer to accomplish this HTML design. Once a custom HTML design is written, you can bring the HTML code into the database for use with the PeopleSoft Enterprise Portal branding. The code must incorporate the system elements that are the foundation of PeopleSoft Enterprise Portal branding.

Reviewing System Elements

Branding *system elements* or *elements* are the distinct entities or components within a portal header or footer. Oracle delivers many hard-coded elements which serve as the foundation for HTML layouts.

System elements are set dynamically. They can either turn into an HTML element, such as an image or hyperlink, or into a portion of HTML, such as a table row or table. They are usually dynamic, for one of the following reasons:

- There are entities such as images or hyperlinks that are configured by the portal administrator to achieve a desired look and feel (administrator defined).
- There are non-static URLs or conditionally-used JavaScript processed by the portal (system defined).

Only those elements designated as configurable are variable and can be assigned user-defined values.

There are generic types of elements that an administrator may choose to utilize within a portal header or footer, including:

Image	Used for company logos or to create a look not readily available via HTML, such as using a curved image to draw a "cap." These are rendered using the HTML tag. <i>See Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide , "Creating Image Definitions"</i>
Image URL Only	Used for situations where the image URL is needed outside an tag, such as background images in style classes.
HTML/Text	Used for simple text messages or custom HTML, such as JavaScript. <i>See Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide, "Creating HTML Definitions"</i>

PeopleSoft Enterprise Portal branding utilizes a few other types of elements to group objects or treats them specially.

Bar	A row of hyperlinks or text elements.
Special Elements	Special elements include My Links, Search, homepage Help, and homepage tabs. These are treated and processed as a distinct unit.

The appearance of menu item-related links configured in bars is conditional upon the user having permission to navigate to any given menu item or special elements. If the user doesn't have permission to access a menu item, it doesn't appear in the Menu pagelet and it will not appear in the header either.

For example in the header PAPPBR_HEADER5_TOOLSNOTAB, where My Links is configured in the header. However, a Guest user does not have permission for this feature, so it does not appear in the header for guest users.

Reviewing HTML Layouts

An *HTML layout* is a predefined arrangement of standard elements. Rather than building the custom HTML objects from scratch, you can select an HTML layout from predefined choices. Within each layout choice, you can turn sections on or off, and customize them by assigning your own images and adding hyperlink URLs.

For instance, an HTML layout may have placeholders for two logo images on the top-left and top-middle of the header. There might also be placeholders for two rows of links — one for the standard links like Home and Signout, and another set of links for other intranet sites. If your specific header only has one logo image in the upper-left and one set of links for Home, Signout, and so forth, you could still base the header definition upon this HTML layout. The unneeded placeholders for the extra images or links would not be used.

Since PeopleSoft applications deliver several HTML layouts, Oracle recommends that you leverage one that is close to your desired layout or placements.

Reviewing Headers

A *header* displays static information across the top of a web page. A header typically includes a unique design identifying the site, logo, search bar and frequently used links.

Reviewing Footers

A *footer* displays static information across the bottom of a web page. A footer typically includes links to privacy statements, terms of use, copyright information, and site maps.

In PeopleSoft Enterprise Portal branding, footers are not displayed on transaction pages.

Reviewing Menu Styles Overrides

A *menu style* is a set of the style sheet, style classes and images applied to the PeopleSoft Enterprise Portal menu pagelet display.

Understanding Items You Can Brand

The PeopleSoft Enterprise Portal branding feature enables you to configure items such as headers, footers, and menus. You then assemble the items into themes, and then assign them according to portal registry, site, or user role.

Note. You may remove and replace Oracle or PeopleSoft logo images. Doing so will not violate your software license and service agreement and is authorized only for PeopleSoft Enterprise Portal licensees.

Reviewing Homepages

A *homepage* is the opening or main page of a Web site, intended chiefly to greet visitors and provide information about the site.

Homepages in the PeopleSoft Enterprise Portal are non-frame-based HTML.

Reviewing Transaction/Target Pages

A *transaction page* or *target page* is the destination of a navigational link. Most of the time, the transaction page or target page is an application or PeopleSoft Pure Internet Architecture page.

PeopleSoft Pure Internet Architecture pages are frame-based, meaning that the header, left navigation area and main body are contained in separate frames.

Target content page presentation is primarily based on the template registered with the content reference. If you use the PeopleSoft Enterprise Portal default template for a target content page, you will have the target content page header and the PeopleSoft Enterprise Menu pagelet with full branding support.

For other delivered templates, presentation will vary depending on what is included in the template. For example, if you choose a template that includes the standard PeopleTools menu, you will not be able to change the image used to expand the menu unless you override the existing image with the new image using the same image name.

Different iScript calls will result in different branding presentations. IScript_UniHeader() will render the homepage header specified in the branding theme without the Personalization bar. IScript_UniHeader_PIA() will render the target content page header specified in the branding theme.

PeopleTools PeopleBooks contain details about creating templates and incorporating these iScript calls into your template.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Designing Portal Templates."

Reviewing Pagelet Templates

PeopleTools provides fixed-named HTML and image objects to build portal homepage tabs. You can override the default HTML objects and images used for homepage components per tab or per pagelet, using the Content Ref Administration page.

In addition to overriding the default HTML for each pagelet, you can also override the default HTML by column.

An example is provided later in this section that demonstrates these concepts.

See [Chapter 9, "Developing Custom Branding Themes," Example: Using Branding and Portal Registry Attributes to Create Custom Homepages, page 121.](#)

Reviewing Headers, Footers and Menus

The following table lists branding items that you can configure.

Configurable Items	Types	Example
Images with or without links.	Image URL (external).	Company logo that links to a homepage when you click the image.
Images with or without links.	Image Catalog (database).	Powered by PeopleSoft image. There is no navigation when you click the image.

Configurable Items	Types	Example
Bar items, including links, text or data, with or without preceding icons.	URL links.	<p>Some predefined choices include:</p> <ul style="list-style-type: none"> • Portal Home. • Site Home. • Worklist. • Add to My Links. • Signout. • Homepage Content/Layout personalization pages. <p>Customizable choices include:</p> <ul style="list-style-type: none"> • Any URL, such as informational Privacy Policy or Contact Us URLs, or navigation to a Web site or business application. • Your choice of a PeopleSoft application content reference (Menu Item).
Bar items, including links, text or data, with or without preceding icons.	Text, static information.	<p>Predefined choices:</p> <ul style="list-style-type: none"> • Select system variables. • User greeting from homepage personalization. <p>Customizable choices:</p> <ul style="list-style-type: none"> • Plain text. • HTML text.
HTML area.	Dynamic HTML.	Stock ticker.
Search.	PeopleSoft Enterprise Portal Search feature.	Delivered code with configurable label, text box for keyword search, and Search (or Go) image.
Scoped Search	Enhanced search feature providing users with additional flexibility to search into specific features (search domains) of the portal.	Delivered code with configurable label, text box for keyword search, Search (or Go) image and Search Scope (index group).

Configurable Items	Types	Example
My Links.	PeopleSoft Enterprise Portal My Links feature. This is an HTML dropdown list containing a user-specified set of favorite portal links.	Delivered code with configurable label.
Homepage tabs.	PeopleTools feature.	Delivered links with configurable graphics and styles.
Homepage Help.	PeopleTools feature.	Delivered link to PeopleSoft Enterprise Portal PeopleBooks with configurable label.
Menus.	Homepage menu and transaction target page menu.	Delivered code with overridable images and styles for backgrounds, folders and links.

Reviewing PeopleSoft Enterprise Portal Sites

When implementing portal sites using PeopleSoft Enterprise Portal Site Management, PeopleSoft enables you to retain the primary enterprise portal brand on the site, display a distinct site brand, or display a mix that includes some aspects of the enterprise portal brand in the site brand.

A site home is a default tab or entry page for a portal site created with the PeopleSoft Enterprise Site Management Create New Site wizard.

In situations where the site inherits the theme of the main enterprise portal, users receive access based on the roles defined for the enterprise portal. Note, however, that the site administrator may be able to override specific elements for the portal site.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Site Management Overview."

Reviewing Collaborative Workspaces

Branding of collaborative workspaces is accomplished through the properties of the workspace template. Each workspace created from a template uses the branding theme assigned to the template. In addition, the workspace template owner can determine which if any branding elements are overridable by workspace administrators.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Setting Up Collaborative Workspace Options and Templates."

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Configuring Advanced Options for a Workspace.

Understanding Branding Methods

Branding allows you to configure the following design aspects which wrap the actual portal content: the header, footer, and navigation menu. You can configure multiple looks and combine them into themes that you assign per portal site and optionally, per user role.

The remaining aspects of a homepage's presentation of pagelets are configurable using the portal registry using the attribute name/value pairs. When you register pagelets and define homepage tabs, you can assign your own designs. Each portal site can assign different styles to the same pagelet. Each site can also have distinct designs for its homepage tabs.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Administering Portals."

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Site Management Overview."

Lastly, the design of the target content page is controlled by the content's source application. For PeopleSoft applications, the target content page layout is determined by the page definition created using Page Designer. The target content page layout is incorporated into the template specified in the portal registry when you register the page (component) as a content reference. Each type of target content page (a PeopleSoft application page, a third-party application page, a web site target page, and so forth) can be registered using a different template, if appropriate. Note that each portal site can register the same target content page using a different template, if required. These complete page templates for target content pages may include a header and menu navigation, or not. They can be frame templates or not. If no template is assigned to the content reference in the portal registry, a default portal template is applied.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Designing Portal Templates."

For custom branding, you can create bind variables to embed dynamic content within your static content, or you can copy existing html objects and modify the table and divs to meet your custom needs.

Storing and Referencing Images, Stylesheets and JavaScript

When creating images, stylesheets, and JavaScript, you have two options:

- Create new images and stylesheets within Application Designer.
- Leverage a centralized repository of images, stylesheets, and JavaScript files.

This section provides examples of how to reference objects stored outside of the PeopleSoft system.

Note. In the examples shown, you can also use relative paths, if the referenced web server is the same as the PeopleSoft portal server or if an alias has been created.

Images

The syntax for referencing images outside of the PeopleSoft system is:

```
<IMG border="0" SRC=<"http//<path to image">
```

For example:

```
<IMG border="0" SRC="http://library.peoplesoft.com/ images/myimage.gif">
```

Stylesheets

You can only select PeopleSoft stylesheets when assembling themes, configuring headers, configuring footers, and setting menu overrides. But you can enter a style class that's not in the system. This provides greater flexibility when you want to use an external stylesheet or embed style classes within your HTML.

The syntax for referencing stylesheets outside of the PeopleSoft system is:

```
<LINK REL="stylesheet" HREF="http://<path to stylesheet>"TYPE="text/css">
```

For example:

```
<LINK REL="stylesheet" HREF="http://library.
peoplesoft.com/css/mystyle.css"TYPE="text/css">
```

JavaScript

The syntax for referencing JavaScript outside of the PeopleSoft system is:

```
<SCRIPT LANGUAGE="JavaScript" SRC="http://<path to javascript">
```

For example:

```
<SCRIPT LANGUAGE="JavaScript" SRC="http://library.
peoplesoft.com/javascript/myjs.js">
```

Reviewing Branding Methods for Homepage Customizations

The following tables summarize the branding methods you should use to perform customizations on homepages.

Note. If both PeopleSoft Enterprise Portal branding and portal registry attribute configuration are checked, in general, you can use the portal registry attribute configuration to override the default HTML objects. If you do not need to override the overall layout and only need to adjust colors and styles, you can choose to include certain style classes in your branding style sheet. Including these style classes also gives you greater control of the color scheme based on portal registry or user role, depending on the branding setup.

The following table summarizes the branding methods you should use to perform PeopleSoft Enterprise Portal graphical user interface (GUI) customizations of the homepage:

<i>Homepage Area</i>	<i>PeopleSoft Enterprise Portal Branding</i>	<i>Portal Registry Attribute Configuration</i>
Homepage template	NA	X
Two- or three-column template	NA	X
Header/footer	X	NA

The following table summarizes the branding methods you should use to perform PeopleSoft Enterprise Portal graphical user interface (GUI) customization of homepage pagelets:

<i>Homepage Pagelet Area</i>	<i>PeopleSoft Enterprise Portal Branding</i>	<i>Portal Registry Attribute Configuration</i>
Pagelet style	X	X

Homepage Pagelet Area	PeopleSoft Enterprise Portal Branding	Portal Registry Attribute Configuration
Action bar	NA	X
Header style	X	X
Body	X	X

The following table summarizes the branding methods you should use to perform PeopleSoft Enterprise Portal graphical user interface (GUI) customization of homepage menus:

Homepage Menu Area	PeopleSoft Enterprise Portal Branding	Portal Registry Attribute Configuration
Pagelet style	X	X
Action bar	NA	X
Header style	X	X
Body	X	X
Navigation	X	NA

Reviewing Branding Methods for Target Page Customizations

The following tables summarize the branding methods you should use to perform customizations on target pages.

Note. If both PeopleSoft Enterprise Portal branding and portal registry attribute configuration are checked, in general, you can use the portal registry attribute configuration to override the default HTML objects. If you do not need to override the overall layout and only need to adjust colors and styles, you can choose to include certain style classes in your branding style sheet. Including these style classes also gives you greater control of the color scheme based on portal registry or user role, depending on the branding setup.

The following table summarizes the branding methods you should use to perform PeopleSoft Enterprise Portal graphical user interface (GUI) customization of target page content:

Target Page Content Area	PeopleSoft Enterprise Portal Branding	Portal Registry Attribute Configuration
Page template	NA	X
Header	X	NA

The following table summarizes the branding methods you should use to perform PeopleSoft Enterprise Portal graphical user interface (GUI) customization of target page menu areas:

Target Page Menu Area	PeopleSoft Enterprise Portal Branding	Portal Registry Attribute Configuration
Pagelet	X	NA
Header	X	NA
Body	X	NA
Navigation	X	NA

Understanding Items You Cannot Brand

The following items are not incorporated into PeopleSoft Enterprise Portal branding configuration pages. Therefore you cannot dynamically display them based upon the portal site or user roles, as with the items you can brand discussed in the previous section.

Some homepage items can be styled using attributes on the content reference entry in the portal registry. Depending on how you designate your changes, the changes can be applied at a portal site, homepage tab, or individual pagelet level.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Modifying the Portal Interface," Using Predefined Homepage HTML Objects, Adapting Homepage and Pagelet Objects.

While you can modify pagelet icons and PeopleTools-level HTML objects, such as homepage layout, pagelet frame, pagelet border, and so on, these elements cannot be applied differently based on user role. One style must be applied throughout, without custom coding.

Reviewing PeopleTools Portal Objects

Within PeopleTools, the objects are set at the portal database level only. You cannot change the parameters or configuration at runtime from the portal application pages. The calls to these objects are currently made in PeopleTools C code to provide the best performance.

Do not make customized code changes to these objects to incorporate them into the branding model. Doing so could make upgrading difficult.

Note. You can override PeopleTools-level objects via content reference attributes. You cannot override PeopleSoft Enterprise Portal-level objects via content reference attributes. Changes to PeopleSoft Enterprise Portal objects should be treated as standard customizations to Application Designer objects, such as HTML objects, PeopleCode, and so on.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Modifying the Portal Interface," Using Predefined Homepage HTML Objects, Adapting Homepage and Pagelet Objects.

Understanding Branding Across Remote Nodes

Remote nodes, such as remote sites, remote content providers, external URLs, and so forth, are applications outside of a PeopleSoft Enterprise Portal which provide content to the portal via links. Remote content is rendered or controlled from the outside application, not the local enterprise portal environment. Once a user navigates to remotely-provided content, portal branding may fall away in favor of the content provider's look, if the remote site takes over the rendering of the entire browser window.

In HTML-based templates, like the homepage, PeopleSoft Enterprise Portal generates or aggregates the HTML for the entire page and sends it to the browser as one page. Thus, there is a greater amount of control over the HTML, and therefore the look and feel. In frame-based templates, typically seen with transaction pages, the portal typically controls the administrative frames, such as the header and left-hand navigation. However, the target frame or page is usually managed by the remote site. The frame acts independently of the others, so the portal does not filter or influence any of the look and feel of the remote site. If the portal renders the frames for the header and left-hand navigation, then the remote site is only influencing the target page frame. However, if the remote site "breaks" its frame, its HTML may be coded to take over the entire browser window. In this case, the portal header is lost and the branding of the remote site takes over.

Reviewing Branding Behavior With Remote Transactions

All branding applies primarily to content references registered in the PeopleSoft Enterprise Portal database. The portal brand may also "wrap" remote content, if that remote content appears within a frame that is separate (and typically under) a header frame that is rendered or controlled by the portal.

PeopleSoft requires that the PeopleSoft Enterprise Portal database be a separate database from application databases. For a PeopleSoft business application database that has only a single link registered in the PeopleSoft Enterprise Portal, the branding of the remote database will control the entire page, including the header. Since this other PeopleSoft application does not include PeopleSoft Enterprise Portal branding, the header and other branding elements will appear as the PeopleTools-delivered defaults.

If you need a consistent portal brand to appear, an approach of registering the content references of the remote application in the PeopleSoft Enterprise Portal registry may be appropriate. You can load the full navigation or information architecture of the PeopleSoft application into the enterprise portal. Refer to two documents posted on My Oracle Support for more details: "PeopleSoft Enterprise Portal 8.4x - Implementing Navigation and Portal Packs" and "Enterprise Portal 8.4x/8.1x: Managing Information Architecture."

With the local registration of remote pages or content you will retain the enterprise portal branding for the portal homepage header, footer, and pagelets. However, the contents of the transaction page will be controlled by the remote content provider, such as another PeopleSoft Pure Internet Architecture (PIA) application or another web site.

If you choose to set up a single link in the enterprise portal to another PeopleSoft application, then navigating to that link will result in a page or homepage where the remote application is rendering the entire browser page. Therefore, the header is not rendered with the enterprise portal branding. To retain the portal branding on the header, you can customize the portal templates in the remote application database so that the header is generated by PeopleSoft Enterprise Portal.

The header and footer are actually generated through iScript calls. If you are in a remote database and need to use the PeopleSoft Enterprise Portal header, change the iScript call from the local node to the PeopleSoft Enterprise Portal node—you need to use the PeopleSoft Enterprise Portal as your content provider for header and footer calls.

For instance, the PeopleSoft Enterprise Portal homepage (HTML.PORTAL_HP_USER_TEMPLATE) uses the following reference for the header:

```
<Pagelet Name="UniversalNavigation">  
  <SOURCE Node="LOCAL_NODE"  
    href="/s/WEBLIB_PORTAL.PORTAL_HOMEPAGE.FieldFormula.  
    IScript_HPDefaultHdr"/>  
</Pagelet>
```

In the remote database, you need to change the node to reference the enterprise portal, not that local node, which in this case is the remote application. Thus, a remote application or database could theoretically get an enterprise portal header.

You should consider and pursue this type of customization only with staff that has ample knowledge and experience in this area.

Chapter 4

Reviewing PeopleSoft Enterprise Portal-Delivered Branding Themes

This chapter discusses the branding themes and HTML layouts that are delivered with Oracle's PeopleSoft Enterprise Portal.

Reviewing Delivered Branding Themes

This section discusses the following delivered branding themes:

- PeopleTools Swan Theme
- Collaborative Workspace Theme - Swan Style
- Collaborative Workspace Theme
- Sample Blue
- Sample Green
- Theme 1 Blue Simple
- Sample GBI
- Branding Blue Curve
- PeopleTools 8.4x Delivered
- PeopleTools 8.4x Guest
- PeopleTools 8.4x Classic
- PeopleTools 8.4x Classic Guest

Oracle delivers twelve configured themes with PeopleSoft Enterprise Portal branding to provide the ability to quickly implement your own branding. By simply making a copy of a delivered theme, header or footer, and placing your own logo and your own choice of links on them, you can have a styled brand right out of the box without any developer effort.

Note. Do not change delivered data. When using any of the delivered branding themes or theme elements, make a copy of the theme or element before adding your own logo or links.

The following table lists the themes delivered with PeopleSoft Enterprise Portal:

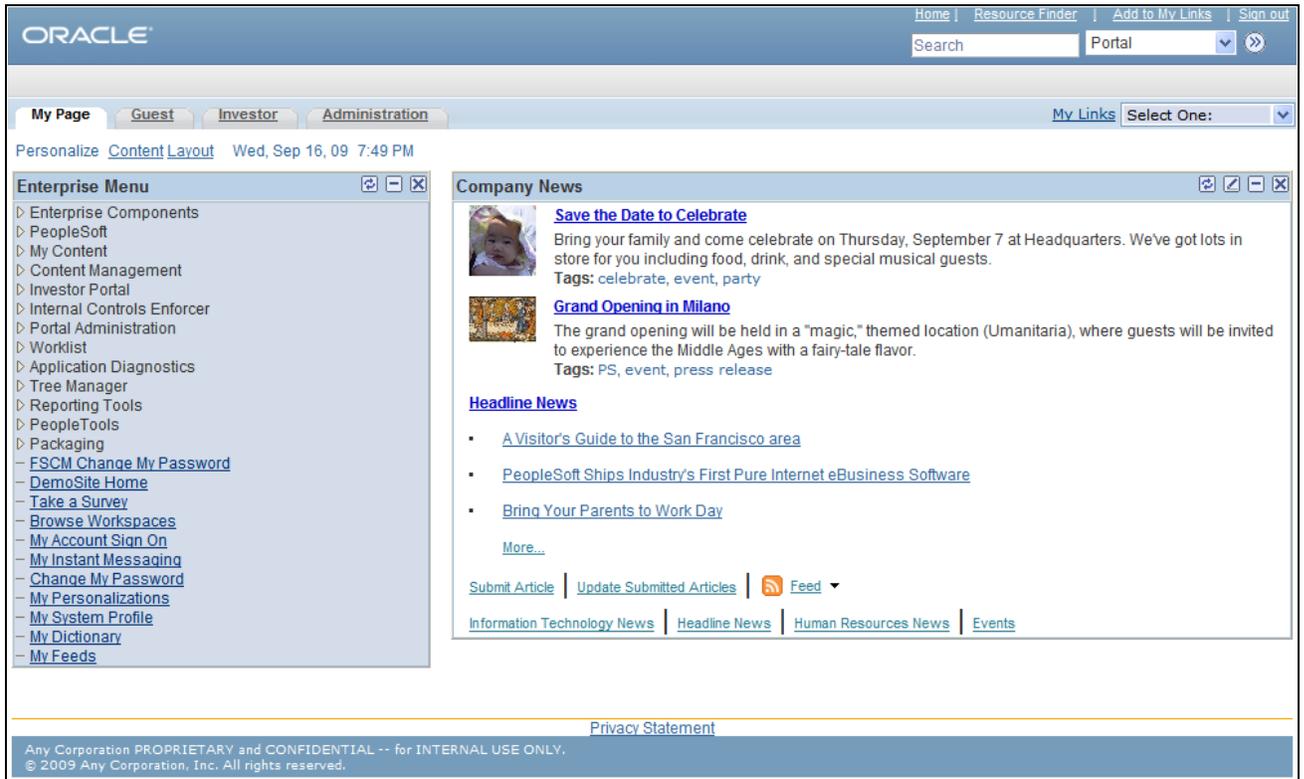
Theme Name	Theme ID	Comments
PeopleTools Swan Theme	PAPPBR_THEME_PT_SWAN	Delivered as the database default theme and assigned as the portal default theme. The SWAN style sheet offers continuity of look and feel across all Oracle applications. The Search box appears in the header rather than with the Menu. Menu has arrows denoting closed folders.
Collaborative Workspace Theme - Swan Style	PAPPBR_THEME_CW_SWAN	Similar color scheme to the default Swan theme. Menu has arrows denoting closed folders.
Collaborative Workspace Theme	PAPPBR_THEME_CW	None.
Sample Blue	PAPPBR_THEME1_BLUE	As delivered, the target page header for this theme is the same as the homepage header. The Search box appears in the header rather than with the Menu. Menu has + signs denoting closed folders.
Sample Green	PAPPBR_THEME1_GREEN	As delivered, the target page header for this theme is the same as the homepage header. The Search box appears in the header rather than with the Menu. Menu has arrows denoting closed folders
Theme 1 Blue Simple	PAPPBR_THEME1S_BLUE	As delivered, the target page header for this theme is the same as the homepage header. The Search box appears in the header rather than with the Menu. Menu has arrows denoting closed folders.
Sample GBI	PAPPBR_THEME2_GBI	As delivered, the target page header for this theme does not have the same links as the homepage header. The Search box appears in the header rather than with the Menu. Menu has arrows denoting closed folders.
Branding Blue Curve	PAPPBR_THEME3__IEONLY_CURVED	This theme was created specifically to work in Internet Explorer browser, and due to style recognition and image alignment issues is not recommended with other browsers. As delivered, the target page header for this theme is the same as the homepage header. The Search box appears in the header rather than with the Menu. Menu has + signs denoting closed folders.

<i>Theme Name</i>	<i>Theme ID</i>	<i>Comments</i>
PeopleTools 8.4x Delivered	PAPPBR_THEME4_TOOLS	The Search box appears in the header rather than with the Menu.
PeopleTools 8.4x Guest	PAPPBR_THEME4G_TOOLS	Contains a homepage header configured without homepage tabs or the Personalization bar. My Links will not appear for Guest users due to lack of security permissions.
PeopleTools 8.4x Classic	PAPPBR_THEME5_TOOLSCLAS SIC	Very similar to the hard-coded PeopleTools header prior to version 8.42. The Search box appears in the header rather than with the Menu. The target page header is configured without the persistent homepage tabs.
PeopleTools 8.4x Classic Guest	PAPPBR_THEME5G_TOOLSCL ASSIC	Contains a homepage header configured without homepage tabs or the Personalization bar. My Links will not appear for Guest users due to lack of security permissions.

The headers delivered with each branding theme display the date and time in the format of the sign-in language.

PeopleTools Swan Theme

Delivered as the database default theme and assigned as the portal default theme. This example shows the portal homepage with the PeopleTools Swan theme:



Homepage - PeopleTools SWAN theme (PAPPBR_THEME_PT_SWAN)

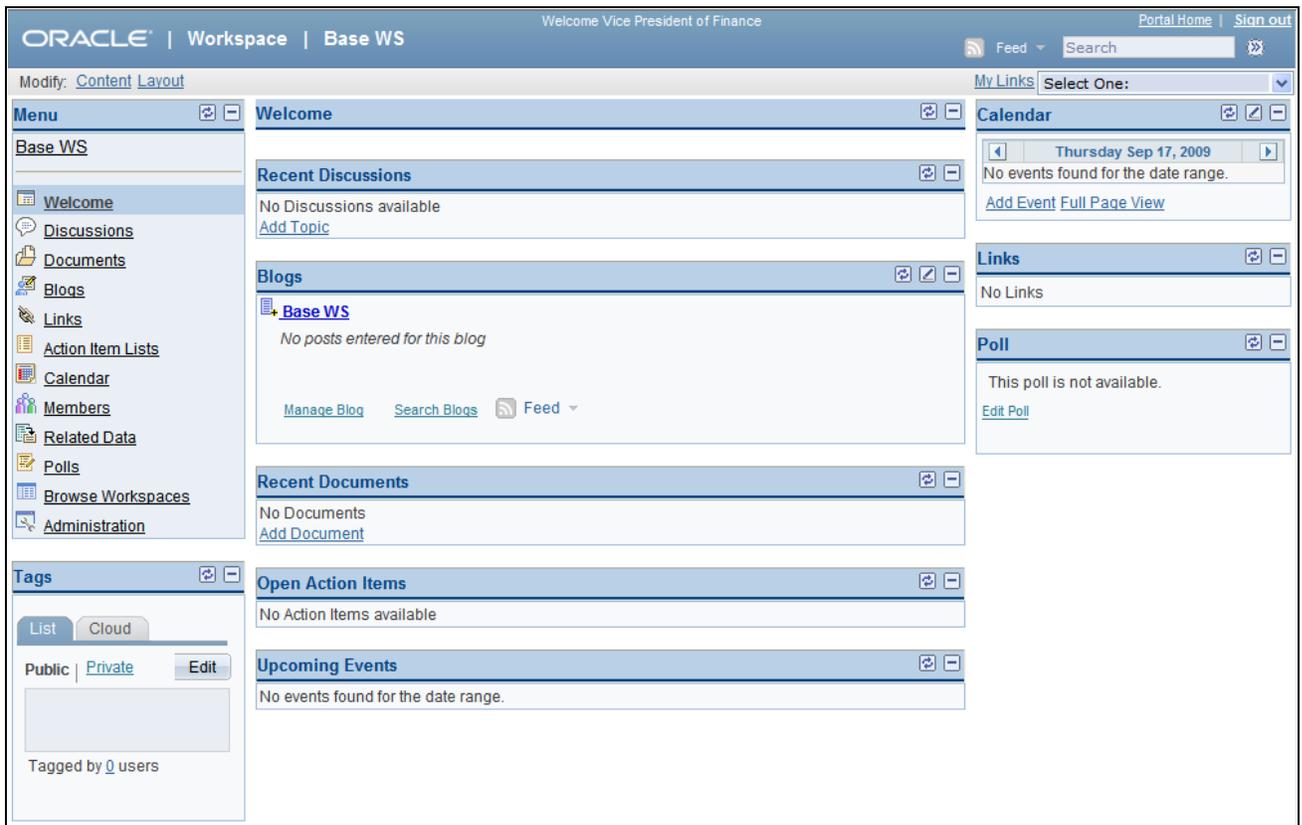
As delivered, the target page header for this theme is the same as the homepage header.

The theme ID for the PeopleTools SWAN theme is PAPPBR_THEME_PT_SWAN. The theme consists of the following components.

Theme Component	Component ID or Object Name
Homepage header	PAPPBR_HEADER7_PT_SWAN
Target page header	PAPPBR_HEADER7_PT_SWAN
Menu Style	PAPPBR_MENU4_PT_SWAN
Homepage footer	PAPPBR_FOOTER5_PT_SWAN
Style sheet	EPPBR_SWANSTYLEDEF

CW Theme - Swan Style

This example shows a workspace with the Collaborative Workspace Swan Style theme applied:



Homepage - Collaborative Workspace theme (PAPPBR_THEME_CW_SWAN)

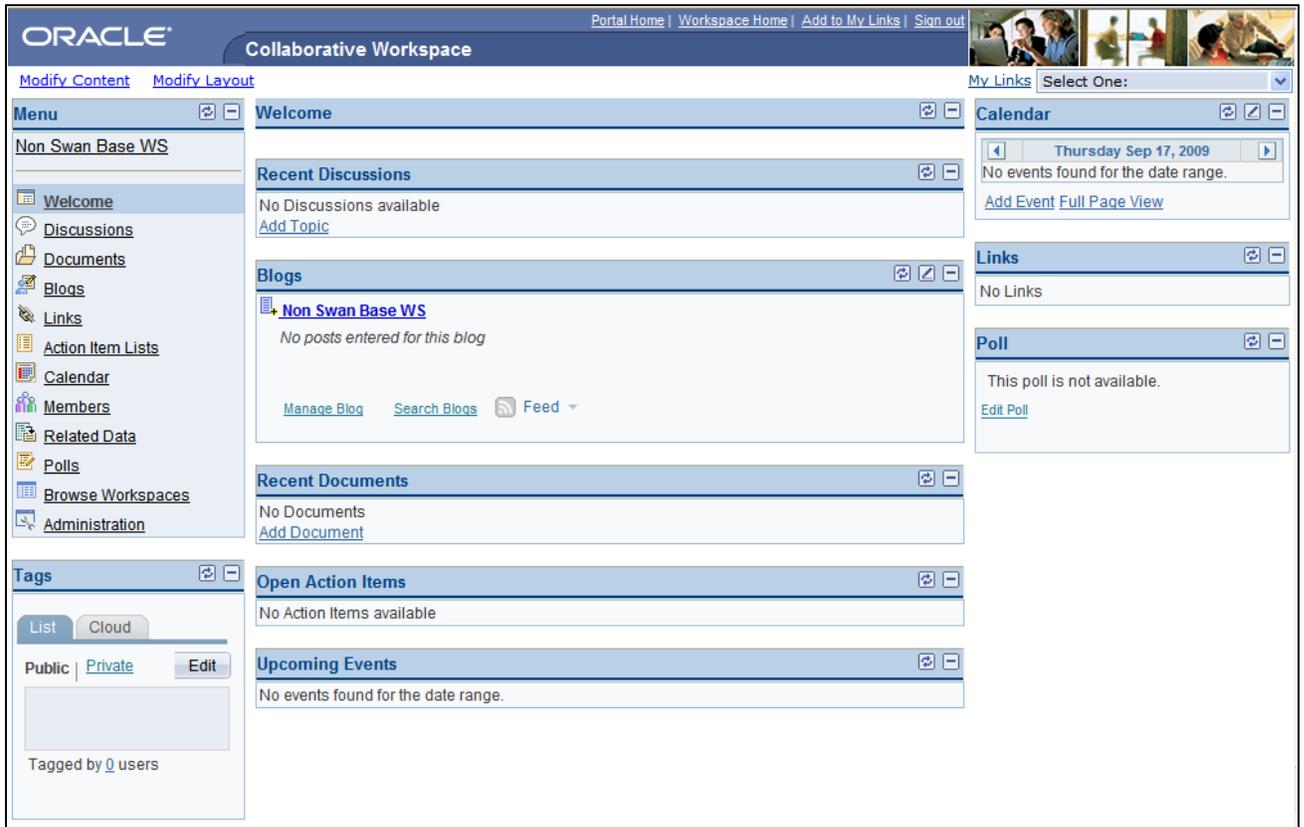
As delivered, the target page header for this theme is the same as the homepage header.

The Theme ID for the Collaborative Workspace theme is PAPPBR_THEME_CW. The theme consists of the following components.

Theme Component	Component ID or Object Name
Homepage header	PAPPBR_HEADER7_WORKSPACE_SWAN
Target page header	PAPPBR_HEADER7_WORKSPACE_SWAN
Menu Style	PAPPBR_MENU6_WORKSPACE
Homepage footer	NA
Style sheet	EPPCW_STYLEDEF

Collaborative Workspace Theme

The following graphic shows a workspace homepage for the Collaborative Workspace theme.



Homepage - Collaborative Workspace theme (PAPPBR_THEME_CW)

As delivered, the target page header for this theme is the same as the homepage header.

The Theme ID for the Collaborative Workspace theme is PAPPBR_THEME_CW. The theme consists of the following components.

Theme Component	Component ID or Object Name
Homepage header	PAPPBR_HEADER6_WORKSPACE
Target page header	PAPPBR_HEADER6_WORKSPACE
Menu override	PAPPBR_MENU6_WORKSPACE
Homepage footer	NA
Style sheet	EPPCW_STYLEDEF

Sample Blue Theme

The following graphic shows the homepage for the Sample Blue theme.



Homepage - Sample Blue theme is (PAPPBR_THEME1_BLUE)

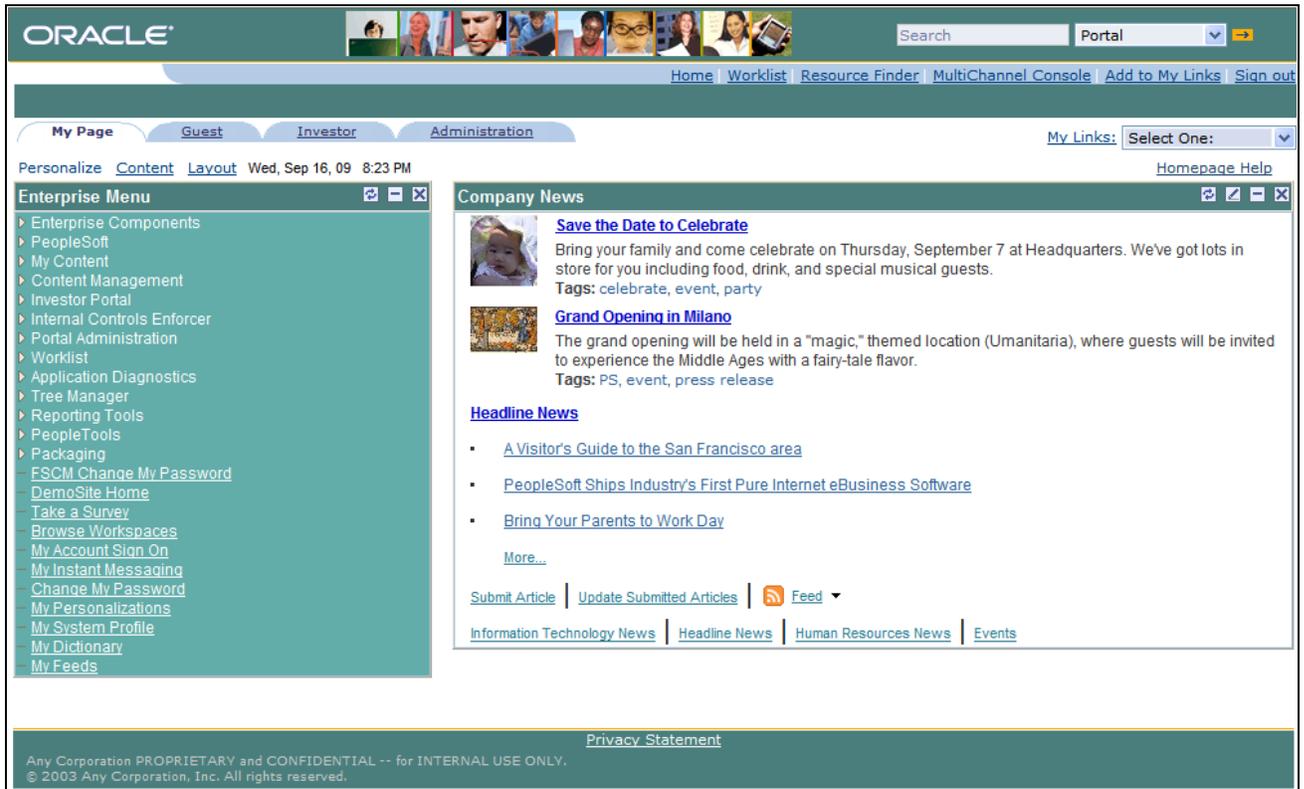
As delivered, the target page header for this theme is the same as the homepage header.

The Theme ID for the Sample Blue theme is PAPPBR_THEME1_BLUE. The theme consists of the following components.

Theme Component	Component ID or Object Name
Homepage header	PAPPBR_HEADER1_BASIC
Target page header	PAPPBR_HEADER1_BASIC
Menu style	PAPPBR_MENU1_BLUE
Homepage footer	PAPPBR_FOOTER1_BASIC
Style sheet	EPPBR_BLUESTYLEDEF

Sample Green Theme

The following graphic shows the homepage for the Sample Green theme.



Homepage - Sample Green theme (PAPPBR_THEME1_GREEN)

As delivered, the target page header for this theme is the same as the homepage header.

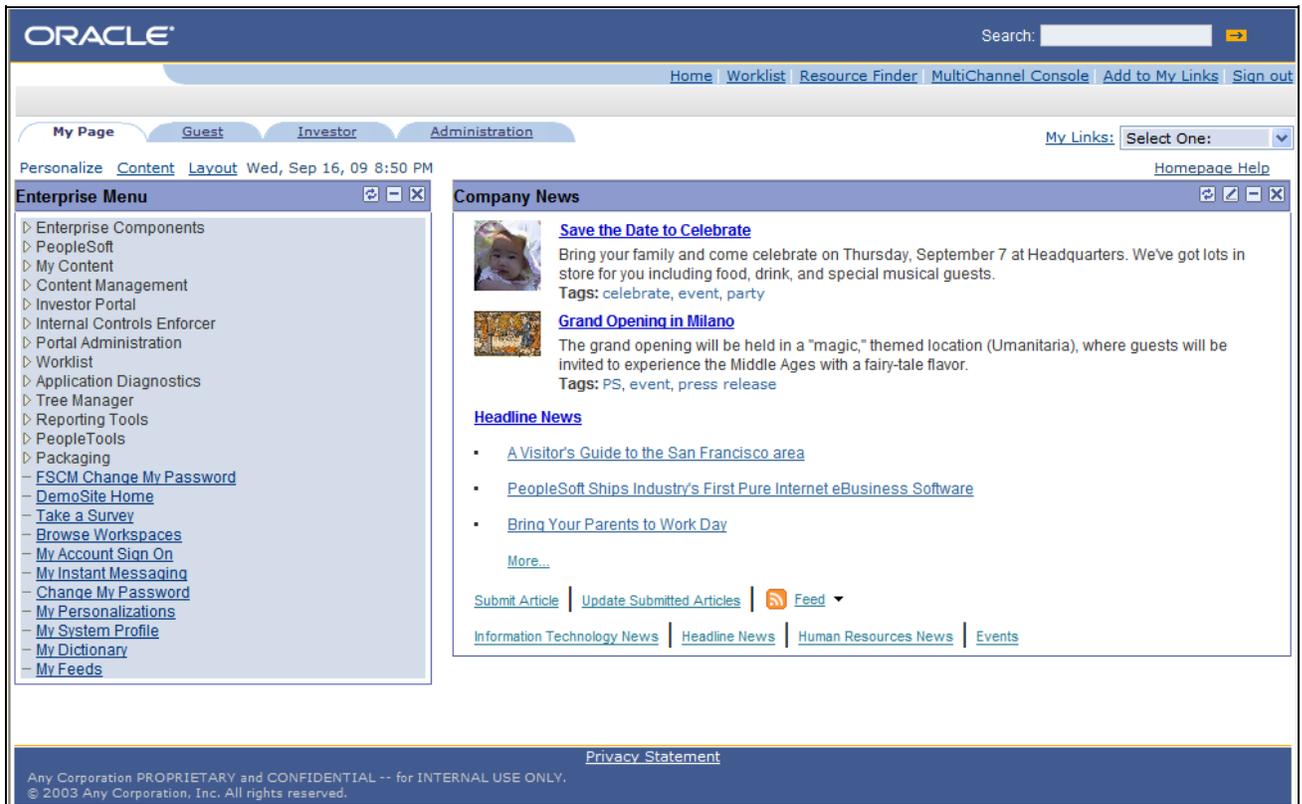
Note. This theme is the same as the Sample Blue theme (PAPPBR_THEME1_BLUE), except that the colors have been switched from blue to green by the application of a different theme style sheet and a green styled menu.

The Theme ID for the Sample Green theme is the PAPPBR_THEME1_GREEN. This theme consists of the following components.

<i>Theme Component</i>	<i>Component ID or Object Name</i>
Homepage header	PAPPBR_HEADER1_BASIC
Target page header	PAPPBR_HEADER1_BASIC
Menu style	PAPPBR_MENU1_GREEN
Homepage footer	PAPPBR_FOOTER1_BASIC
Style sheet	EPPBR_GREENSTYLEDEF

Theme 1 Blue Simple

The following graphic shows the homepage for the Theme 1 Blue Simple theme.



Homepage - Blue Simple theme (PAPPBR_THEME1S_BLUE)

As delivered, the target page header for this theme is the same as the homepage header.

The Theme ID for the Theme 1 Blue Simple theme is PAPPBR_THEME1S_BLUE . This theme consists of the following components.

Theme Component	Component ID or Object Name
Homepage header	PAPPBR_HEADER1_SIMPLE
Target page header	PAPPBR_HEADER1_SIMPLE
Menu style	PAPPBR_MENU2_GBI
Homepage footer	PAPPBR_FOOTER1_BASIC
Style sheet	EPPBR_BLUESTYLEDEF

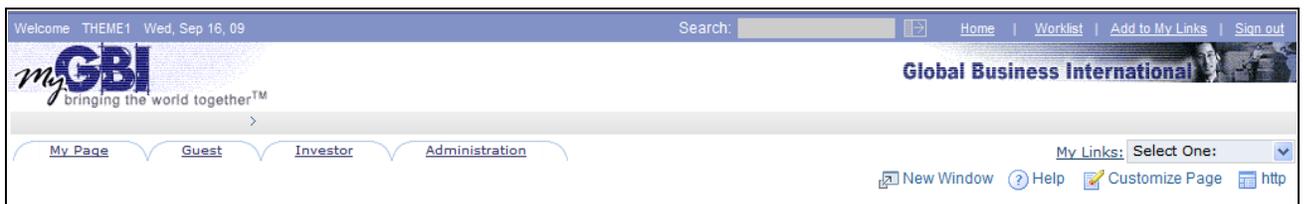
Sample GBI Theme

The following graphic shows the homepage for the Sample GBI theme.



Homepage - Sample GBI theme (PAPPBR_THEME2_GBI)

The following graphic shows the target page for the theme. Note that it was configured without the homepage tabs (My Page and Administration) persisting on the header.



Target page - Sample GBI theme

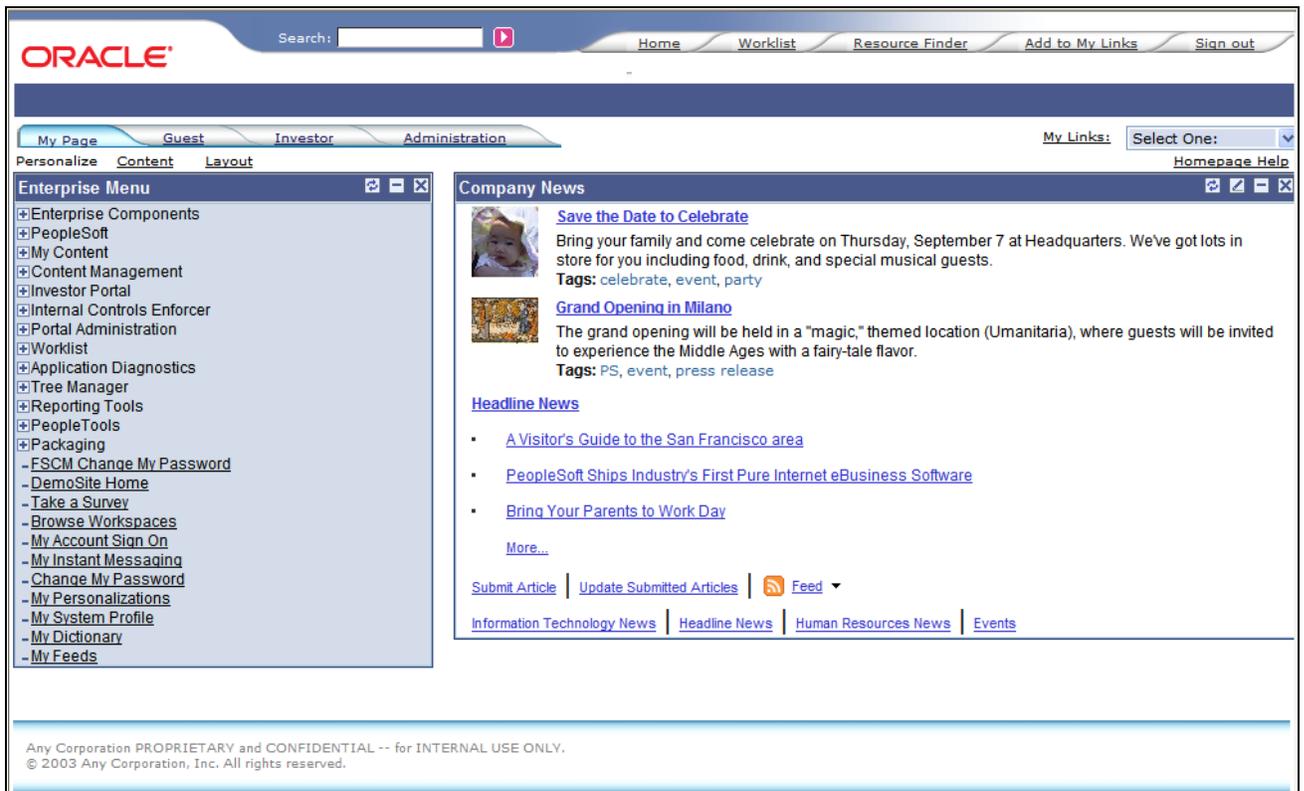
The Theme ID for the Sample GBI theme is PAPPBR_THEME2_GBI. This theme consists of the following components.

Theme Component	Component ID or Object Name
Homepage header	PAPPBR_HEADER2_GBI

<i>Theme Component</i>	<i>Component ID or Object Name</i>
Target page header	PAPPBR_HEADER2_GBINOTAB
Menu style	PAPPBR_MENU2_GBI
Homepage footer	PAPPBR_FOOTER2_GENERIC
Style sheet	EPPBR_BLUE_GBI_STYLEDEF

Branding Blue Curve Theme

The following graphic shows the Branding Blue Curve theme. Oracle recommends that you use this theme with Microsoft Internet Explorer browsers only due to style recognition and image alignment issues with other browsers.



Homepage - Branding Blue Curve theme (PAPPBR_THEME3__IEONLY_CURVED)

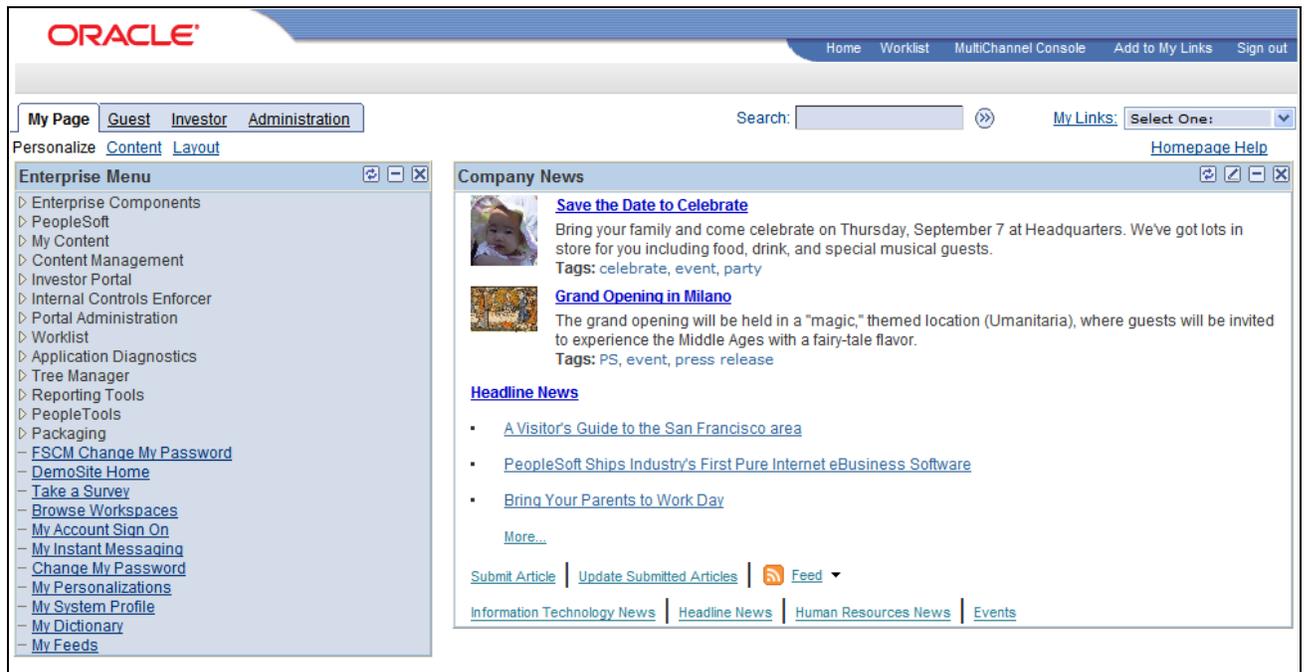
As delivered, the target page header for this theme is the same as the homepage header.

The Theme ID for the Branding Blue Curve theme is PAPPBR_THEME3__IEONLY_CURVED. This theme consists of the following components.

<i>Theme Component</i>	<i>Component ID or Object Name</i>
Homepage header	PAPPBR_HEADER3_IEONLY_CURVED
Target page header	PAPPBR_HEADER3_IEONLY_CURVED
Menu style	PAPPBR_MENU3_CURVED
Homepage footer	PAPPBR_FOOTER3_IEONLY_CURVED
Style sheet	EPPBR_BLUE_CURVE_STYLEDEF

PeopleTools 8.4x Delivered Theme

The following graphic shows the PeopleTools 8.4x Delivered theme. Search in the header rather than in the Menu, and My Links instead of Favorites.



Homepage - PeopleTools 8.4x Delivered theme (PAPPBR_THEME4_TOOLS)

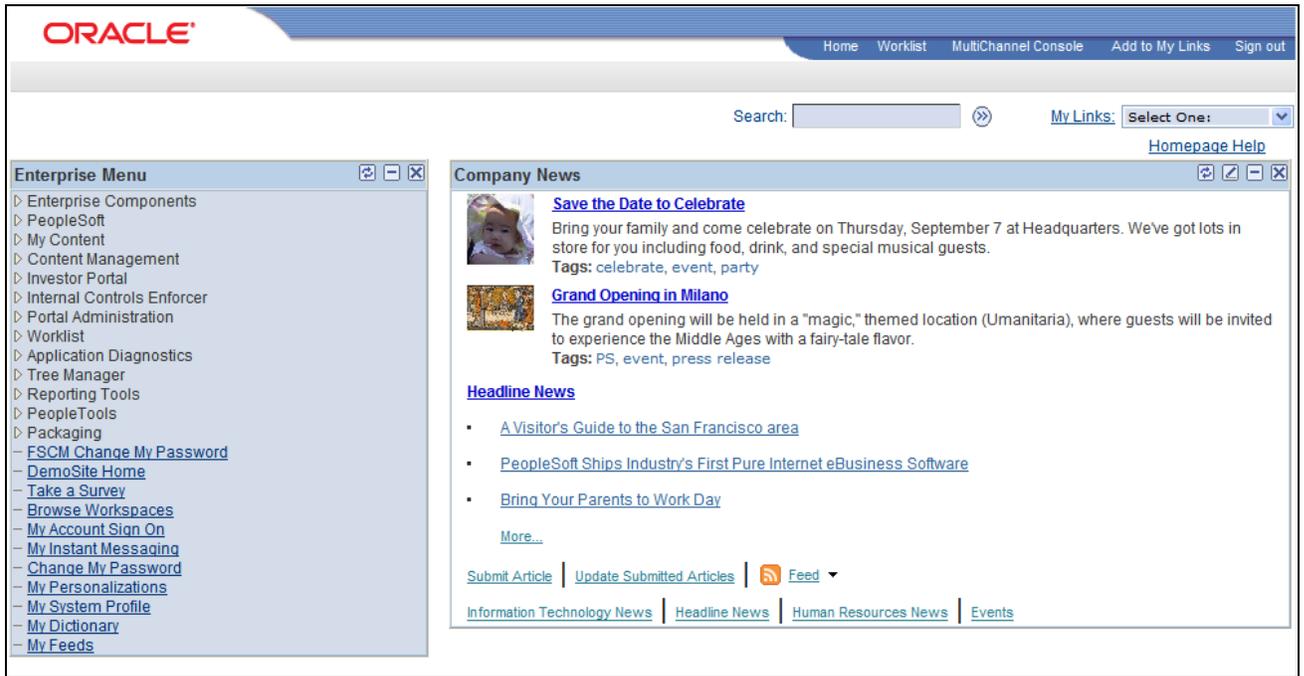
As delivered, the target page header for this theme is the same as the homepage header.

The Theme ID for the PeopleTools 8.4x Delivered theme is PAPPBR_THEME4_TOOLS. This theme consists of the following components.

<i>Theme Component</i>	<i>Component ID or Object Name</i>
Homepage header	PAPPBR_HEADER4_TOOLS
Target page header	PAPPBR_HEADER4_TOOLS
Menu style	No overrides applied. PeopleTools default menu applies.
Homepage footer	PAPPBR_FOOTER4_POWERED
Style sheet	EPPBR_TOOLSSTYLEDEF

PeopleTools 8.4x Guest Theme

The following graphic shows the PeopleTools 8.4x Guest theme.



Homepage - PeopleTools 8.4x Guest theme (PAPPBR_THEME4G_TOOLS)

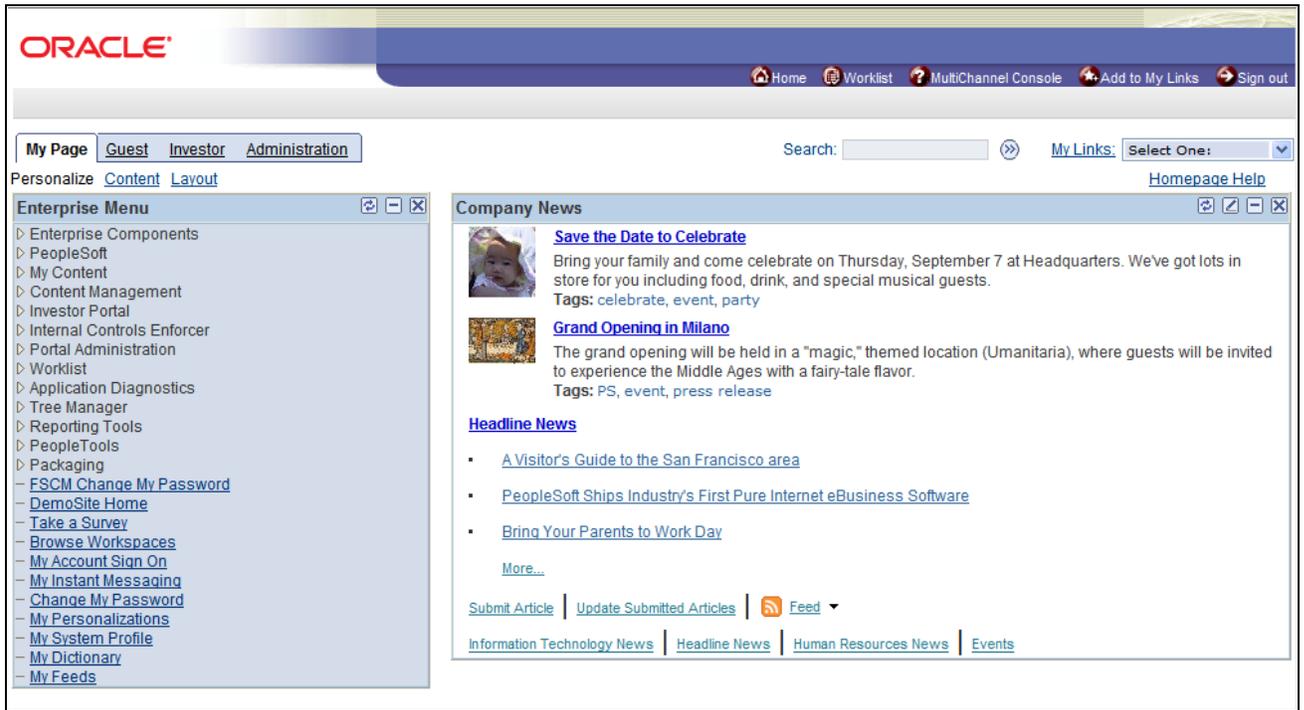
As delivered, the target page header for this theme is the same as the homepage header. The header does not include homepage tabs or Personalization and will not display My Links to Guests due to lack of security permissions.

The Theme ID for the PeopleTools 8.4x Guest theme is PAPPBR_THEME4G_TOOLS. This theme consists of the following components.

Theme Component	Component ID or Object Name
Homepage header	PAPPBR_HEADER4_TOOLS_NOTAB
Target page header	PAPPBR_HEADER4_TOOLS_NOTAB
Menu style	No overrides applied. PeopleTools default menu applies.
Homepage footer	PAPPBR_FOOTER4_POWERED
Style sheet	EPPBR_TOOLSSTYLEDEF

PeopleTools 8.4x Classic Theme

The following graphic shows the PeopleTools 8.4x Classic theme.



Homepage - PeopleTools 8.4x Classic theme (PAPPBR_THEME5_TOOLSCLASSIC)

The target page header for this theme is shown in the following graphic. Homepage links are available.



PeopleTools 8.4x Classic Theme target page

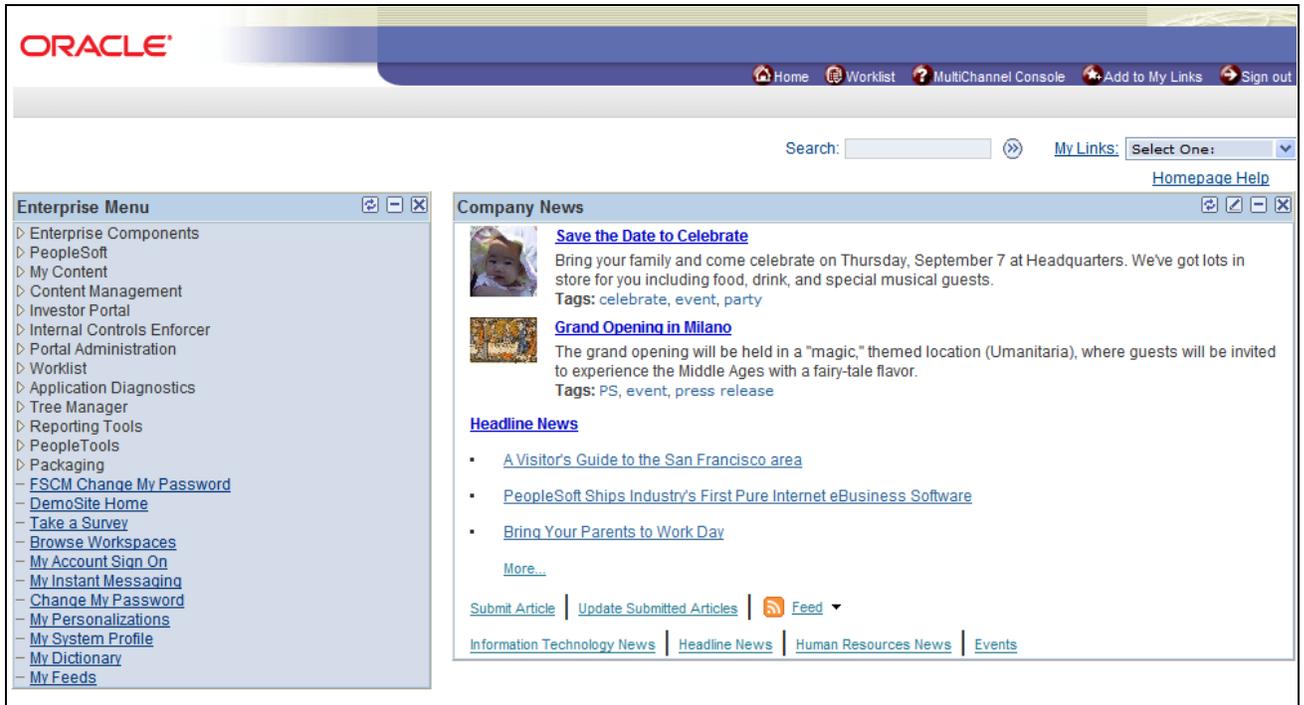
The Theme ID for the PeopleTools 8.4x Classic theme is PAPPBR_THEME5_TOOLSCLASSIC. This theme consists of the following components.

Theme Component	Component ID or Object Name
Homepage header	PAPPBR_HEADER5_TOOLSCLASSIC
Target page header	PAPPBR_HEADER5_TOOLSNOTAB
Menu style	No overrides applied. PeopleTools default menu applies.
Homepage footer	PAPPBR_FOOTER4_POWERED

Theme Component	Component ID or Object Name
Style sheet	EPPBR_TOOLSSTYLEDEF

PeopleTools 8.4x Classic Guest Theme

The following graphic shows the PeopleTools 8.4x Classic Guest theme.



Homepage - PeopleTools 8.4x Classic Guest theme (PAPPBR_THEME5G_TOOLSCLASSIC)

As delivered, the target page header for this theme is the same as the homepage header.

The Theme ID for the PeopleTools 8.4x Classic Guest theme is PAPPBR_THEME5G_TOOLSCLASSIC. This theme consists of the following components. The header does not include homepage tabs or Personalization and will not display My Links to Guests due to lack of security permissions.

Theme Component	Component ID or Object Name
Homepage header	PAPPBR_HEADER5_TOOLSNOTAB
Target page header	PAPPBR_HEADER5_TOOLSNOTAB
Menu style	No overrides applied. PeopleTools default menu applies.

<i>Theme Component</i>	<i>Component ID or Object Name</i>
Homepage footer.	PAPPBR_FOOTER4_POWERED
Style sheet	EPPBR_TOOLSSTYLEDEF

Chapter 5

Setting Up PeopleSoft Enterprise Portal Branding

This chapter discusses Oracle's PeopleSoft Enterprise Portal branding set up and describes how to:

- Enable PeopleSoft Enterprise Portal branding.
- Manage system elements.
- Create and enable HTML layouts.

Enabling PeopleSoft Enterprise Portal Branding

This section discusses how to enable PeopleSoft Enterprise Portal branding.

Pages Used to Enable PeopleSoft Enterprise Portal Branding

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Installation Options	EO_PE_OPTIONS1	Portal Administration, System Data, Installation Options	Enable or disable PeopleSoft Enterprise Portal branding.

Enabling Branding

Access the Installation Options page (Portal Administration, System Data, Installation Options).

Note. By default, the PeopleSoft Enterprise Portal is delivered with branding enabled.

Installation Options		Portal and Security Defaults	Last ID Values
<p>Select the Portal Solutions installation system options. The Image Attachment URL Path is used to dynamically look up where the content management image attachments are on the web server. This path is used to render the image. The maximum email notifications limits the number of notifications that can be sent.</p>			
Search Results Weighting			
<input type="checkbox"/> Include Content Rating Results			
Search Alert Notification			
<input checked="" type="checkbox"/> Enable Saved Search Alerts			
Branding			
<input checked="" type="checkbox"/> Enable Branding Themes			
<input checked="" type="checkbox"/> Enable Adding Image Objects			
<input checked="" type="checkbox"/> Enable Adding HTML Objects			
Resource Finder			
<input checked="" type="checkbox"/> Enable Resource Finder			
<input type="checkbox"/> Use Resource Finder for Profile Pages			
Content Management			
*Image Attachment URL Path:	<input type="text" value="/ps/images/portal_pa/"/>		
Discussion Forums			
*Discussions Viewing Default:	<input type="text" value="Threaded View"/> ▼		
<input checked="" type="checkbox"/> Site Specific			
Collaborative Workspaces			
Maximum Email Notifications:	<input type="text"/>		
*Default Module Image:	<input type="text" value="PS_EPPCW_WELCOME_ICN"/> 🔍		
<input checked="" type="checkbox"/> Default Presence Indicators in Members Module			
<input checked="" type="checkbox"/> Enable External Users			
Calendar Events / Action Items			
*Export Option:	<input type="text" value="Open Calendar Program"/> ▼		
*Alerts iCal Attachment:	<input type="text" value="No iCal attachment on Alerts"/> ▼		

Installation Options page

There are special application classes for PeopleSoft Enterprise Portal branding and another set for when basic PeopleTools branding applies. When you enable PeopleSoft Enterprise Portal branding, the application package and application class information for PeopleSoft Enterprise Portal is populated in the PeopleTools Options page.

Note. When PeopleSoft Enterprise Portal branding is enabled, My Links functionality is also enabled as is the display of the Add to My Links link on the portal header.

To enable or disable PeopleSoft Enterprise Portal branding:

1. Access the Installation Options page.
2. Locate the Branding section.
3. Select the Enable Branding Themes check box to enable branding.
Clear this check box to disable this feature.
4. Select the Enable Adding Image Objects check box to enable uploading of images to the image catalog.
5. Select the Enable Adding HTML Objects check box to enable adding and updating HTML objects from branding page.
6. Save your changes.

Managing Branding System Elements

This section discusses how to manage branding system elements.

Pages Used to Manage Branding System Elements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
System Elements	EPPBR_ELEMENT	Portal Administration, Branding, Define Elements, View System Elements	View all branding elements noting which are configurable and which are not. Specify which elements are overridable when used by sites.

Managing System Elements

Access the System Elements page (Portal Administration, Branding, Define Elements, View System Elements).

System Elements

These Elements are used in the HTML Layouts for page headers and footers with each one supporting specific aspects of the design. Only those Elements designated Configurable are variable and can be assigned user-defined values. Check Overridable for the Elements that may be configured when used on Sites.

Branding Elements Customize | Find | View 100 | | First 1-10 of 101 Last

General Information
Additional Comments

Element ID	Layout Type	Type	Description	Configurable	Can be Overridden by Sites
1	Header	My Links	My Links %1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Header	Search	Search Options %2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Header	Homepage Help	Homepage Help Display %3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Header	Bar	Personalization %4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Header	Home Page Tab	Tab Display %5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Header	Bar	Header Bar One %6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Header	Bar	Header Bar Two %7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	Header	Bar	Header Bar Three %8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	Header	Bar	Header Bar Four %9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	Header	Bar	Header Bar Five %10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

System Elements page

The System Elements page enables you to view all the system elements. Use the page to specify the elements that are overridable when used by sites.



Click to remove section tabs and show all columns of information.

Element ID

Unique numeric identifier for the element. These elements are hard coded and serve as the foundation for PeopleSoft Enterprise Portal branding.

Layout Type

Indicates the type of layout where the specific element can be used. The valid options are:

- Header (homepage and target page).
- Footer (homepage only).

Type	<p>Element type. The valid options are:</p> <ul style="list-style-type: none"> • My Links. • Search. • Homepage Help. • Bar (table row, link bar). • Homepage Tab. • HTML Area/Text. • Image. • Image URL. • Scoped Search.
Description	Description of the element type including its bind variable. This becomes the default description for the elements listed on the HTML Layouts and Element Selection page.
Configurable	<p>This is a read-only field. Elements marked configurable are available to accept various values to create different branding designs. Set these values using the Define Header and Define Footer pages.</p> <p>Elements that are not configurable drive the basic functionality of PeopleSoft Enterprise Portal branding.</p>
Can be Overridden by Sites	<p>Select the check box to indicate that sites can override the element with site-specific configuration values.</p> <p>If grayed out, you cannot specify if the element is overridable. In these instances, the existing setting is required to drive PeopleSoft Enterprise Portal branding.</p>
Comments	<p>Displays when the Additional Comments tab is selected or when all columns are displayed.</p> <p>Add notes and descriptive information about the element.</p>
	<p>See <i>Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide</i>, "Creating Image Definitions."</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide</i>, "Creating HTML Definitions."</p>

Creating and Enabling HTML Layouts

This section provides an overview and discusses how to create and enable HTML layouts.

Understanding Creating and Enabling HTML Layouts

When you create an HTML layout, you define a layout that will support header and footer custom configurations. To incorporate an HTML design to function within PeopleSoft Enterprise Portal branding, you must enable the branding elements in the layout definition that match functionality in the underlying matching HTML object code.

If you are using any of the delivered layouts, you do not need to enable any branding elements. PeopleSoft delivers these layouts enabled. You must create and enable new HTML layouts only if you are using your own custom-designed HTML objects for header or footer layout designs.

Warning! If you start selecting and deselecting elements for any of the delivered layouts, the HTML layout definition may no longer match the code in the underlying HTML design object. You can enable them again by viewing the HTML text and selecting again the appropriate elements.

Elements that are required to drive the core aspects of PeopleSoft Enterprise Portal branding are automatically enabled and cannot be edited. These elements appear grayed out on the HTML Layouts and Element Selection page.

Pages Used to Create and Enable HTML Layouts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
HTML Layouts and Element Selection	EPPBR_LAYOUT	Portal Administration, Branding, Define Elements, Enable HTML Layouts, HTML Layouts and Element Selection	Select the branding elements that are used in the HTML object code.

Creating and Enabling Layouts

Access the HTML Layouts and Element Selection page (Portal Administration, Branding, Define Elements, Enable HTML Layouts, HTML Layouts and Element Selection).

HTML Layouts and Element Selection

Start by selecting an HTML object and Layout Type. Then, select the Elements used in the HTML Object. The HTML object's bind values must be an exact functional match to the Elements listed here. Alter the Custom Label to provide clarity during the Header and Footer definition tasks. Mark the Element Required if it must always be defined with a value.

HTML Layout ID: PAPPBR_PLCMTHDR1_BASIC

*Description:

*HTML Object Name:



[Add New HTML](#)

[View HTML Text](#)

Layout Type: Header

Branding Elements				
ID	Select	Required Element	Element Name	*Custom Label
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	My Links %1	My Links %1
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Search Options %2	Search Options %2
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Homepage Help Display %3	Homepage Help Display %3
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Personalization %4	Personalization Links %4
5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tab Display %5	Homepage Tab Display %5
6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Header Bar One %6	Header Main Bar One %6
7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Header Bar Two %7	Header Greeting Bar Two %7

HTML Layouts and Element Selection page

Note. When creating a new HTML object to be used in an HTML layout, make sure to include all the non-configurable system elements. These elements are essential for the system to function. Model your new HTML object after the delivered HTML objects, and keep all of the non-configurable system element binds in place.

To create and enable a new HTML layout:

1. Access the Enable HTML Layouts page.
2. Click the Add a New Value tab.
3. In the HTML Layout ID field, enter a name for the layout.
4. Click the Add button. The HTML Layouts and Element Selection page displays.
5. In the Description field, enter a descriptive name for the layout.
6. In the HTML Object Name field, enter the HTML object on which to base the layout, or use the Lookup button to select one. The HTML object must have been previously loaded into the PeopleSoft Enterprise Portal database using PeopleTools Application Designer to appear in the lookup. You can also add new HTML at this point.

To add new HTML to the system catalog, click the [Add New HTML](#) link.

The Add to HTML Catalog page appears enabling you to add and edit a new HTML object.

7. From the Layout Type dropdown list, select the type of layout.

All of the delivered branding elements relevant to the selected type display.

The valid options are:

- Header
 - Footer
8. Select the Select check box for all elements that are in the HTML object code. Make sure the element functionality matches.
 9. Select the Required check box to specify that an element must always be configured. If the element is not required, you don't have to define value(s) for it on the Define Header or Define Footer pages.
 10. The Custom Label column should contain a description of how the element is used in the layout. The name you enter is used as the element name on the header or footer configuration pages. For example, you could change the description *My Links %1* to *My Links, Lower Right %1*.
 11. Save your changes.

Note. PeopleSoft 9.1 Enterprise Portal delivers the EPPBR_HDRHTML_BASE HTML HTML object as the base for creating any new header for use with branding.

See [Appendix A, "Using Bind Variables," Example: Creating and Configuring Custom Branding Headers with Bind Variables, page 153.](#)

Viewing the HTML Text

Access the View HTML Text page (click the View HTML Text link on the HTML Layouts and Element Selection page).

View HTML Text

HTML Details

Name:	PAPPBR_HTMLFTR1_BASIC	Description:	Sample footer 1
--------------	-----------------------	---------------------	-----------------

```

<html>
<table class="EPPBRLAYOUTTABLE" width="100%" border="0" cellspacing="0" cellpadding="0" summary="">
  <tr>
    <!-- footer image %bind11-->
    <td class="EPPBRFTRTOP">%bind(:11)</td>
  </tr>
  <tr>
    <!-- footer image %bind12-->
    <td class="EPPBRFTRMIDDLE">%bind(:12)</td>
  </tr>
  <tr>
    <!-- footer bar %bind6-->
    <td>%bind(:6)</td>
  </tr>
  <tr>
    <!-- custom HTML %bind31-->
    <td class="EPPBRFTRTEXT">%bind(:31)</td>
  </tr>
</table>
<!--system reserved elements %bind1, %bind2, %bind3, %bind4, %bind5-->
%bind(:1)
%bind(:2)
%bind(:3)
%bind(:4)
%bind(:5)
</html>

```

[Close Window](#)

View HTML Text page

To aid in matching up elements between the HTML layout and the HTML object, click the View HTML Text link. The HTML object code displays in a new window.

Adding New HTML to the System Catalog

Access the Add to HTML Catalog page (click the Add New HTML link on the HTML Layouts and Element Selection page).

Add to HTML Catalog

Enter the HTML Object Name, Description, and the HTML to be stored in the HTML System Catalog. Click OK to save. You will be able to edit the HTML once the object is saved.

HTML Details

***Name:** **Description:**

Add to HTML Catalog page

Enter a unique name and description for the HTML object. The system displays the prefix PAPP, as a default.

Use this page to paste HTML code that you've cut or copied from another source or type in the HTML that you want to add to the catalog.

Editing HTML Objects

Access the HTML Catalog page. (click the Browse HTML Catalog icon on the HTML Layouts and Element Selection page).

HTML Catalog

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search by: Name begins with

 [Add New HTML](#)

Search Results

HTML Objects		Customize Find View All First <input type="button" value="1 of 1"/> Last
HTML Object Name	Description	
PAPPBR_HTMLFTR1_BASIC	Sample footer 1	<input type="button" value="View"/>

HTML Catalog search page

To add a new HTML object to the catalog, click the link to [Add New HTML](#).

To edit the HTML that you have previously added, click the [Edit](#) button. The Edit HTML Object page appears where you can alter the HTML.

HTML objects cannot be deleted online. Use Application Designer to delete any HTML or image objects.

Note. Only HTML objects that have been added using the [Add New HTML](#) page can be edited from these pages. Delivered HTML objects or ones added from Application Designer cannot be edited from this page.

Chapter 6

Understanding PeopleSoft Enterprise Portal-Delivered HTML Layouts

This chapter discusses:

- The list of delivered HTML layouts.
- The Sample Header 1 layout.
- The Sample GBI Header 1 layout.
- The Blue Curve Header layout.
- The PeopleTools Default layout.
- The PeopleTools Classic layout.
- The Sample Footer 1 layout.
- The Sample Footer 2 layout
- The Blue Curve Footer layout.
- The Workspace Header layout.
- The PeopleTools SWAN Header layout.
- The CW SWAN Header layout.

Reviewing the List of Delivered HTML Layouts

Oracle delivers eleven enabled HTML layouts with PeopleSoft Enterprise Portal branding—eight header HTML layouts and three footer HTML layouts. These layouts allow you to get started right away configuring headers and footers. The delivered layouts are shown in the following table.

<i>Layout Name</i>	<i>HTML Layout ID</i>	<i>Layout Type</i>	<i>HTML Object Name</i>
Sample Header 1.	PAPPBR_PLCMNTHDR1_BASIC	Header	PAPPBR_HTMLHDR1_BASIC

Layout Name	HTML Layout ID	Layout Type	HTML Object Name
Sample GBI Header 1.	PAPPBR_PLCMNTHDR2_GBI	Header	PAPPBR_HTMLHDR2_GBI
Blue Curve Header.	PAPPBR_PLCMNTHDR3_CURVED	Header	PAPPBR_HTMLHDR3_CURVED
PeopleTools Default.	PAPPBR_PLCMNTHDR4_TOOLS (PeopleTools default layout, application9.1 default layout is the SWAN theme.)	Header	PAPPBR_HTMLHDR4_TOOLS
Tools Classic.	PAPPBR_PLCMNTHDR5_TOOLSCLASSIC	Header	PAPPBR_HTMLHDR5_TOOLSCLASSIC
Tools Swan	PAPPBR_PLCMNTHDR7_PT_SWAN	Header	PAPPBR_HTMLHDR7_PT_SWAN
CW Swan HTML Layout	PAPPBR_PLCMNTHDR7_CW_SWAN	Header	PAPPBR_HTMLHDR7_WORKSPACE_SWAN
Sample Footer 1.	PAPPBR_PLCMNTFTR1_BASIC	Footer	PAPPBR_HTMLFTR1_BASIC
Sample Footer 2.	PAPPBR_PLCMNTFTR2_GENERIC	Footer	PAPPBR_HTMLFTR2_GENERIC
Blue Curve Footer.	PAPPBR_PLCMNTFTR3_CURVED	Footer	PAPPBR_HTMLFTR3_CURVED
Workspace Header Layout	PAPPBR_PLCMNTHDR6_WORKSPACE	Header	PAPPBR_HTMLHDR6_WORKSPACE

The following sections show the delivered headers and footers that are based on each of the delivered HTML layouts. The sections also show the basic underlying elements of the HTML layout that are enabled for each header and footer. Note that more elements may be available in the HTML object code.

To view all possible branding elements available for a layout, use the HTML Layout and Selection page. To access this page, select Portal Administration, Branding, Define Elements, Enable HTML Layouts.

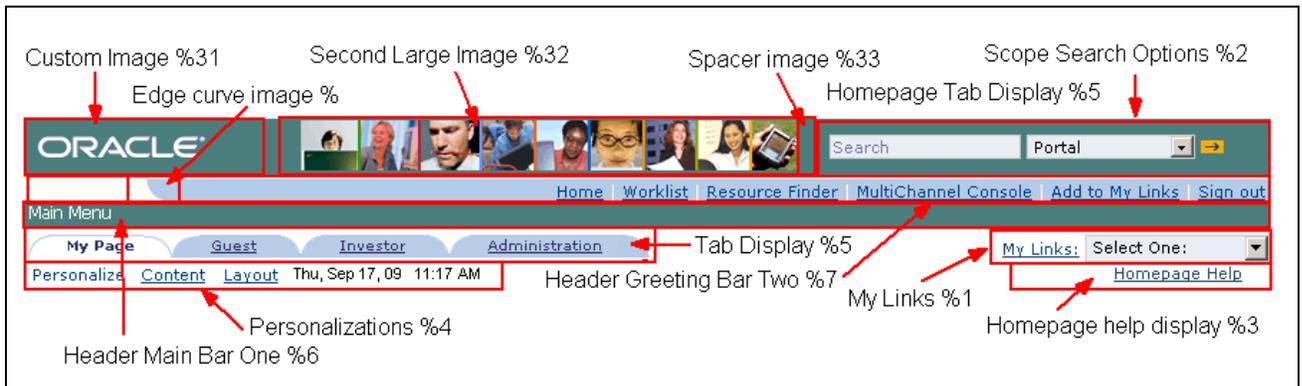
Reviewing the Sample Header 1 Layout

This section discusses the Sample Header 1 layout.

The HTML layout ID PAPPBR_PLCMNTHDR1_BASIC is used by two delivered headers:

- PAPPBR_HEADER1_BASIC
- PAPPBR_HEADER1_SIMPLE

The enabled elements and their approximate placement are shown in the following overlay:



PAPPBR_HEADER1_BASIC header with approximate element placement

The examples shown in this section demonstrate the dramatically different looks that you can achieve using the same layout by simply configuring different elements or changing the style sheet. The first two graphics show the PAPPBR_HEADER1_BASIC header with different style sheets applied. The third graphic shows the PAPPBR_HEADER1_SIMPLE header, which does not have the image of the people (Custom Image (%32)) enabled in the header.

The following two header graphics are based on the following information:

- HTML object name: PAPPBR_HTMLHDR1_BASIC
- HTML Layout ID: PAPPBR_PLCMNTHDR1_BASIC

The following graphic shows the PAPPBR_HEADER1_BASIC header with the EPPBR_GREENSTYLEDEF style sheet applied.



PAPPBR_HEADER1_BASIC header with the EPPBR_GREENSTYLEDEF style sheet applied

The following graphic shows the same header, PAPPBR_HEADER1_BASIC, with a different style sheet applied, EPPBR_BLUESTYLEDEF.



PAPPBR_HEADER1_BASIC header with the EPPBR_BLUESTYLEDEF style sheet applied

The third header graphic shows a different header, PAPPBR_HEADER1_SIMPLE, with the EPPBR_BLUESTYLEDEF style sheet applied.

The graphic is based on the following information:

- HTML object name: PAPPBR_HTMLHDR1_BASIC
- HTML Layout ID: PAPPBR_PLCMNTHDR1_SIMPLE

The following system elements are included in the header.

System Elements

These Elements are used in the HTML Layouts for page headers and footers with each one supporting specific aspects of the design. Only those Elements designated Configurable are variable and can be assigned user-defined values. Check Overridable for the Elements that may be configured when used on Sites.

Branding Elements Customize | Find | View 100 | First 1-10 of 101 Last

General Information Additional Comments

Element ID	Layout Type	Type	Description	Configurable	Can be Overridden by Sites
1	Header	My Links	My Links %1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Header	Search	Search Options %2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Header	Homepage Help	Homepage Help Display %3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Header	Bar	Personalization %4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Header	Home Page Tab	Tab Display %5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Header	Bar	Header Bar One %6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Header	Bar	Header Bar Two %7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	Header	Bar	Header Bar Three %8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	Header	Bar	Header Bar Four %9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	Header	Bar	Header Bar Five %10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

System Elements included in PAPPBR_HTMLHDR1_BASIC

Example of the third and final header, PAPPBR_HEADER1_SIMPLE, with the EPPBR_BLUESTYLEDEF style sheet applied. Note that In the simple header, the second image of the people does not appear.



PAPPBR_HEADER1_SIMPLE with the EPPBR_BLUESTYLEDEF style sheet applied without people

Reviewing the Sample GBI Header 1 Layout

This section discusses the Sample GBI Header 1 layout.

The following header graphic shows the following information:

- HTML Layout ID: PAPPBR_PLCMNTHDR2_GBI.
- HTML object name for the Layout ID: PAPPBR_HTMLHDR2_GBI.
- Header: PAPPBR_HEADER2_GBI.
- Theme style sheet applied: EPPBR_BLUE_GBI_STYLEDEF.



PAPPBR_HEADER2_GBI header

The enabled elements and their approximate placement are shown in the following grid:

Bar 2 (%7)	Search (%2)	Bar 1 (%6)
Image (%31)	Image (%32)	
Homepage Tabs (%5)		My Links (%1)
Personalize Bar (%4)	Homepage Help (%3)	

Enabled elements for the PAPPBR_HEADER2_GBI header

Reviewing the Blue Curve Header Layout

This section discusses the Blue Curve Header layout.

The following header graphic shows the following information:

- HTML Layout ID: PAPPBR_PLCMNTHDR3_CURVED.
- HTML object name for the Layout ID: PAPPBR_HTMLHDR3_CURVED.
- Header: PAPPBR_HEADER3_IEONLY_CURVED.
- Theme style sheet applied: EPPBR_BLUESTYLEDEF.



PAPPBR_HEADER3_IEONLY_CURVED header

The enabled elements and their approximate placement are shown in the following grid:

Image (%36)	Search (%2)	Bar 2 (%7)
		Bar 1 (%6)
Homepage Tabs (%5)		My Links (%1)
Personalize Bar (%4)		Homepage Help (%3)

Enabled elements for the PAPPBR_HEADER3_IEONLY_CURVED header

Note. There are also numerous images used to create the curved dividers around the logo, on Bar 1, on the Personalize Bar and on the homepage tabs.

Reviewing the PeopleTools Default Layout

This section discusses the PeopleTools Default layout. When you install your PeopleSoft applications, PSSTYLEDEF is the application style sheet for PeopleSoft applications prior to and including application release 9.0. PSSTYLEDEF_SWAN is the default application style sheet when you install your PeopleSoft applications for releases 9.1 and newer.

See Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide, "Creating Style Sheet Definitions", Working with the Default Style Sheet

The following header graphic shows the following information:

- HTML Layout ID: PAPPBR_PLCMNTHDR4_TOOLS.
- HTML object name for the Layout ID: PAPPBR_HTMLHDR4_TOOLS.
- Header: PAPPBR_HEADER4_TOOLS.
- Theme style sheet applied: EPPBR_TOOLSSTYLEDEF.



PAPPBR_HEADER4_TOOLS header

The enabled elements and their approximate placement are shown in the following grid:

Image (%31)		Bar 2 (%7)	
		Bar 1 (%6)	
Homepage Tabs (%5)		Search (%2)	My Links (%1)
Personalize Bar (%4)		Homepage Help (%3)	

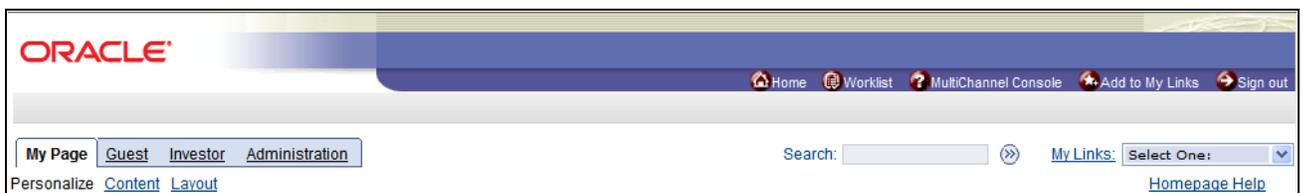
Enabled elements for the PAPPBR_HEADER4_TOOLS header

Reviewing the PeopleTools Classic Layout

This section discusses the PeopleTools Classic layout.

The following header graphic shows the following information:

- HTML Layout ID: PAPPBR_PLCMNTHDR5_TOOLSCLASSIC.
- HTML object name for the Layout ID: PAPPBR_HTMLHDR5_TOOLSCLASSIC.
- Header: PAPPBR_HEADER5_TOOLSCLASSIC.
- Theme style sheet applied: EPPBR_TOOLSSTYLEDEF.



PAPPBR_HEADER5_TOOLSCLASSIC header

The enabled elements and their approximate placement are shown in the following grid:

Image (%31)	Image (%32)	Image (%33)
	Bar 2 (%7)	
	Bar 1 (%6)	
Homepage Tabs (%5)	Search (%2)	My Links (%1)
Personalize Bar (%4)		Homepage Help (%3)

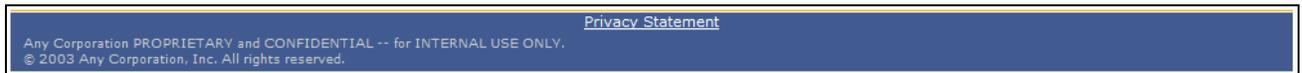
Enabled elements for the PAPPBR_HEADER5_TOOLSCLASSIC header

Reviewing the Sample Footer 1 Layout

This section discusses the Sample Footer 1 layout.

The following footer graphic shows the following information:

- HTML Layout ID: PAPPBR_PLCMNTFTR1_BASIC.
- HTML object name for the Layout ID: PAPPBR_HTMLFTR1_BASIC.
- Footer: PAPPBR_FOOTER1_BASIC.
- Theme style sheet applied: EPPBR_BLUESTYLEDEF.



PAPPBR_FOOTER1_BASIC footer

The enabled elements and their approximate placement are shown in the following grid:

Image (%11)
Spacer Image (%12)
Bar 1 (%6)
Custom HTML Area (%31)

Enabled elements for the PAPPBR_FOOTER1_BASIC footer

Reviewing the Sample Footer 2 Layout

This section discusses the Sample Footer 2 layout.

This HTML layout is used by two delivered footers, the PAPPBR_FOOTER2_GENERIC footer and the PAPPBR_FOOTER4_POWERED footer.

As the graphics shown in this section demonstrate, you can have dramatically different looks using the same layout by simply configuring different elements.

The following footer graphics show the following information:

- HTML Layout ID: PAPPBR_PLCMNTFTR2_GENERIC.
- HTML object name for the Layout ID: PAPPBR_HTMLFTR2_GENERIC.

The following graphic shows the sample footer PAPPBR_FOOTER2_GENERIC with the style sheet EPPBR_BLUESTYLEDEF applied.



PAPPBR_FOOTER2_GENERIC footer

The following graphic shows the sample footer PAPPBR_FOOTER4_POWERED with the style sheet EPPBR_BLUESTYLEDEF applied.



PAPPBR_FOOTER4_POWERED footer

The enabled elements and their approximate placement are shown in the following grid:

Image (%11)		
Image (%12)	Bar 1 (%6)	Image (%13)
Bar 2 (%7)		
Custom HTML Area (%31)		

Enabled elements for the PAPPBR_FOOTER2_GENERIC and PAPPBR_FOOTER4_POWERED footers

Reviewing the Blue Curve Footer Layout

This section discusses the Blue Curve Footer layout.

The following footer graphic shows the following information:

- HTML Layout ID: PAPPBR_PLCMNTFTR3_CURVED.
- HTML object name for the Layout ID: PAPPBR_HTMLFTR3_CURVED.
- Footer: PAPPBR_FOOTER3_IEONLY_CURVED.
- Theme style sheet applied: EPPBR_BLUESTYLEDEF.



PAPPBR_FOOTER3_IEONLY_CURVED footer

The enabled elements and their approximate placement are shown in the following grid:

Image (%11)
Custom HTML Area (%31)
Image (%12)

Enabled elements for the PAPPBR_FOOTER3_IEONLY_CURVED footer

Reviewing the Workspace Header Layout

This section discusses the Workspace Header layout.

Header Preview

If you use embedded Styles in the HTML Layout, leave the Style Sheet Name blank. If you use PeopleSoft Style Sheets, select one from the prompt table. Click Refresh to apply the new style.

Workspace Header

01/01/1900

Style Sheet Name:

Homepage Header

Target Page Header

Note: The Personalize elements will never appear on the header for Target pages.

PAPPBR_PLCMNTHDR6_WORKSPACE header

The enabled elements and their approximate placement are shown in the following grid:

PAPPBR_PLCMNTHDR6_WORKSPACE (Workspace header layout)		
Image (%31)	Bar 1 (%6)	Image (%32)
	Image (%33)	Custom HTML Area (%51)
Personalize Bar with additional links (%4)		My Links (%1)
		Homepage Help (%3)

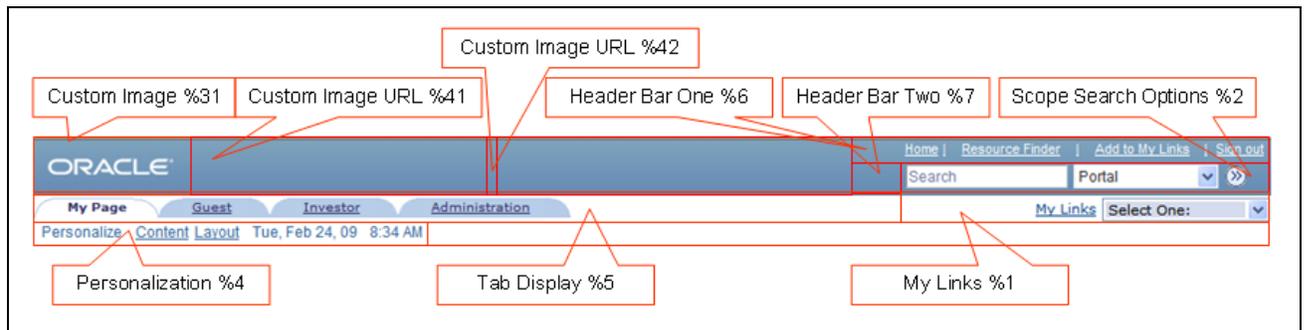
Enabled elements for the PAPPBR_PLCMNTHDR6_WORKSPACE header

Reviewing the PeopleTools SWAN Header Layout

This section discusses the PeopleTools SWAN layout.

The following header graphic shows the following information:

- HTML Layout ID: PAPPBR_PLCMNTHDR7_PT_SWAN.
- HTML object name for the Layout ID: PAPPBR_HTMLHDR7_PT_SWAN.
- Header: PAPPBR_HEADER7_PT_SWAN.
- Theme style sheet applied: EPPBR_SWANSTYLEDEF.



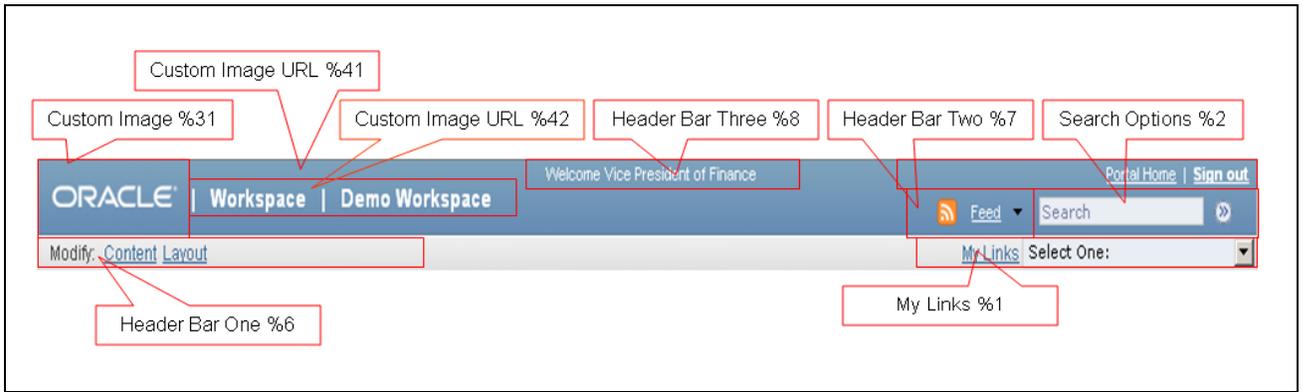
Enabled elements and their approximate placement for the PAPPBR_HEADER7_PT_SWAN header

Reviewing the CW SWAN Header Layout

This section discusses the CW SWAN layout.

The following header graphic shows the following information:

- HTML Layout ID: PAPPBR_PLCMNTHDR7_CW_SWAN.
- HTML object name for the Layout ID: PAPPBR_HTMLHDR7_WORKSPACE_SWAN.
- Header: PAPPBR_HEADER7_WORKSPACE_SWAN.
- Theme style sheet applied: EPPCW_STYLEDEF.



Enabled elements and their approximate placement for the PAPPBR_HTMLHDR7_WORKSPACE_SWAN header

Chapter 7

Configuring and Assembling Branding Themes

This chapter contains common header and footer elements and discusses how to:

- Configure headers and footers.
- Define overrides for menu styles.
- Assemble branding themes.

Configuring Headers and Footers

This section lists common elements and pages used in configuring headers and footers and describes how to:

- Select headers and footers.
- Specify header and footer images.
- Add and edit header and footer bar elements
- Enable HTML elements in headers and footers.
- Define special bar elements—headers only (My Links, Search options, homepage Help, homepage display tab).
- Create dated versions of headers and footers.
- Delete headers and footers.

Common Elements Used to Configure Headers and Footers



Click the arrow to display instructions for using a page.

Header ID, Footer ID

Header or footer object name.

Effective Date

Use this field to specify the date that the header or footer should take effect.



Click the button to copy a complete header or footer setup from an existing header or footer to a new dated version of the current header or footer.



Click the button to preview the header or footer. The Preview button appears after any header or footer is saved.

When the preview window is open, you can also preview how different style sheets would impact the header or footer display. When the preview window is open, click the Lookup button next to the Style Sheet field, select a style sheet and click the Refresh button. Keep in mind that this is a preview only. To apply a different style sheet to a header or footer, use the Assemble Themes page.

Description

Description for the branding theme component. For example, customer header, human resources department footer, blue menu style, and so on.

HTML Layout ID

HTML layout on which a header or footer definition is based.

Details

Click the link to view the HTML Layout and Selection page.

From the HTML Layout and Selection page you can click the View HTML link to view the hard-coded elements to understand the header or footer rendering.

Add

You can use the Add button under two conditions:

- When adding or editing headers and footers, click the button to add an effective-dated version of a header or footer.
- When adding or editing bar items, click the button to add a bar item.

Delete

You can use the Delete button under two conditions:

- When adding or editing headers and footers, click the button to delete an effective-dated version of a header or footer.
- When adding or editing bar items, click the button to delete a bar item.

Enabled

Check to enable an element for the header ID or footer ID. Required header and footer elements, per the related HTML layout, are automatically checked and grayed out.

Element

Custom label assigned to the system element in the related HTML layout.

Image Source

Source of the image for the header or footer element. The choices are:

- *Catalog*. Choose to select an image from the Application Designer Image Catalog.
- *URL*. Specifies that the source of the header or footer element image is located via a URL address to a web server hosting images for the PeopleSoft Enterprise Portal.

Image Object Name

Displays if the image source is *Catalog*. Indicates the name of the image object to display for the header or footer element.



Click the Browse Image Catalog button to select a header or footer element image from the Image Catalog.

Image URL	Displays if the image source is <i>URL</i> . Specifies the location of the header or footer element image. URLs can be absolute or relative.
Image Attributes	Specify standard HTML tag attributes to refine the display of element images.
Hover Text	Enter text to display at runtime when a user hovers over an image.
Target URL	Enter a target URL that the user will access when the image is clicked. If you don't want the image to be "clickable" or act like a hyperlink, leave this blank.
Overridable	Check the box to indicate that portal sites can choose to allow the site administrator to override the element for a site-specific brand.
Style Class	Click the Lookup button to choose a style class from an Application Designer style sheet, or manually enter one that is defined within a global or embedded style sheet declaration in the HTML layout object code.
Seq#	Specifies the order in which a bar item (link or text) displays on the header or footer bar.

Pages Used to Configure Headers and Footers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Header	EPPBR_HEADER	Portal Administration, Branding, Define Headers, Define Header	Define and preview headers used in themes. Create versioned (effective-dated) headers.
Images	EPPBR_HEADER_IMG	Portal Administration, Branding, Define Headers, Images	Select and configure image elements used in headers.
Header Preview	EPPBR_HDR_PREVIEW	Click the  icon on the Images page.	View the header so that you can view it with other stylesheets.
Bars	EPPBR_HEADER_LINK	Portal Administration, Branding, Define Headers, Bars	Select and configure bar elements used in headers.
HTML Area	EPPBR_HEADER_HTML	Portal Administration, Branding, Define Headers, HTML Area	Enable and configure HTML elements used in the header.

Page Name	Definition Name	Navigation	Usage
Special Elements	EPPBR_HEADER_OTHER	Portal Administration, Branding, Define Headers, Special Elements	Define special elements you place on header bars, such as My Links, Search options, homepage Help and homepage tab displays. These special elements are available only on headers.
Define Footer	EPPBR_HEADER	Portal Administration, Branding, Define Footers, Define Footer	Configure and preview footers used in themes. Create versioned (effective dated) footers.
Images	EPPBR_HEADER_IMG	Portal Administration, Branding, Define Footers, Images	Select and configure image elements used in footers.
Bars	EPPBR_HEADER_LINK	Portal Administration, Branding, Define Footers, Bars	Select and configure bar elements used in footers.
Bar Details	EPPBR_HDRLINK_SEC	Click the Edit Items button on the Bars page.	Add or edit bar items.
HTML Area	EPPBR_HEADER_HTML	Portal Administration, Branding, Define Footers, HTML Area	Enable and configure HTML elements used in the footer.

Selecting Headers and Footers

This section discusses how to:

- Add new headers and footers.
- Select an existing header or footer.

Adding New Headers and Footers

When you add a new header or footer, you have the option of copying an existing header or footer to use as a starting point for your configuration.

Note. The delivered headers and footers consist of system data. During the upgrade process new system data will overwrite existing system data. Therefore, to support upgrading use the Copy Header and Copy Footer options to create headers and footers with unique header and footer names.

To add a new header, access the Define Header page (Portal Administration, Branding, Define Headers).

Define Header page

To add a new footer, access the Define Footer page (Portal Administration, Branding, Define Footers).

Define Footer page

Note. Elements selected on the HTML Layout and Selection page determine the tabs that display on the Define Header and Define Footer pages. For instance, if there are no images or HTML areas, then those tabs are hidden.

To add a header or footer:

1. To add a header, select Portal Administration, Branding, Define Headers.
To add a footer, select Portal Administration, Branding, Define Footers.
2. Click the Add a New Value tab.
3. In the ID field, enter an object name for the header or footer.

Note. The name you enter cannot start with a number or contain spaces.

4. Click the Add button. The Define Header or Define Footer page displays.
Initially when you add a Header ID or Footer ID, there is only one tab visible, the Define Header or Define Footer tab. The other tabs appear (as appropriate) after you specify an HTML Layout ID.
5. In the Effective Date field, enter the date that the header or footer will take effect.
6. To add new header or footer information, use the steps that follow. To copy information from an existing header or footer to the new one, go to Step 7.
 - a. In the Description field, enter a description.
 - b. In the HTML Layout ID field, enter a layout ID or click the Lookup button to select one.
To view the elements of the HTML Layouts and Elements page, click the Details link.
 - c. Save the changes.
7. To copy all configuration information from an existing header or footer to the new header or footer:
 - a. Click the Copy Existing button. The Copy Existing page displays.
 - b. Use the Preview button to preview existing headers or footers.
 - c. Select the Header ID or the Footer ID of the header or footer to copy.
 - d. Click the OK button.

Selecting an Existing Header or Footer

To choose an existing header or footer:

In general, to modify existing header or footer definitions, use Correct History mode. The default mode is Update/Display, so you must explicitly select Correct History mode.

1. To choose an existing header, select Portal Administration, Branding, Define Headers.
To choose an existing footer, select Portal Administration, Branding, Define Footers.
2. Click the Search button.
3. In the Results List, click a header or footer with which to work.

Specifying Header and Footer Images

Access the Define Header - Images page (Portal Administration, Branding, Define Headers, Images) or the Define Footer - Images page (Portal Administration, Branding, Define Footers, Images).

Define Header - Images page: General tab

Use this page to select image elements to use in the header or footer. The Image Detail section enables you to assign an image reference to each enabled element, enter image attributes to refine the display of images, enter target URLs for images that will act like hyperlinks, and specify if portal sites can override the elements. The system displays the Header ID, description, and Effective Date for the header or footer.



Click the icon to preview the header

Selecting Image Elements

To select image elements used in a header or footer:

1. Select the Enabled checkbox for each element for which you want to display an image.

Note. Required elements display checked and grayed out.

2. From the Image Source dropdown list, select the source of the image: Catalog or URL.
3. Specify the Image Object Name or the Image URL.

If the Image Source is *Catalog*, in the Image Object Name field, use the Lookup button to select the image object to appear in the header or footer for the selected element.

If the Image Source is *URL*, in the Image URL field, enter the URL where the image is located.

Refining Image Elements

Access the Image Attributes tab (select the Image Attributes tab on the Define Header - Image page).

After you specify images for header and footer elements, use the Image Attributes tab in the Image Detail section to refine the display of the images and define the text that displays at runtime when a user hovers over the image.



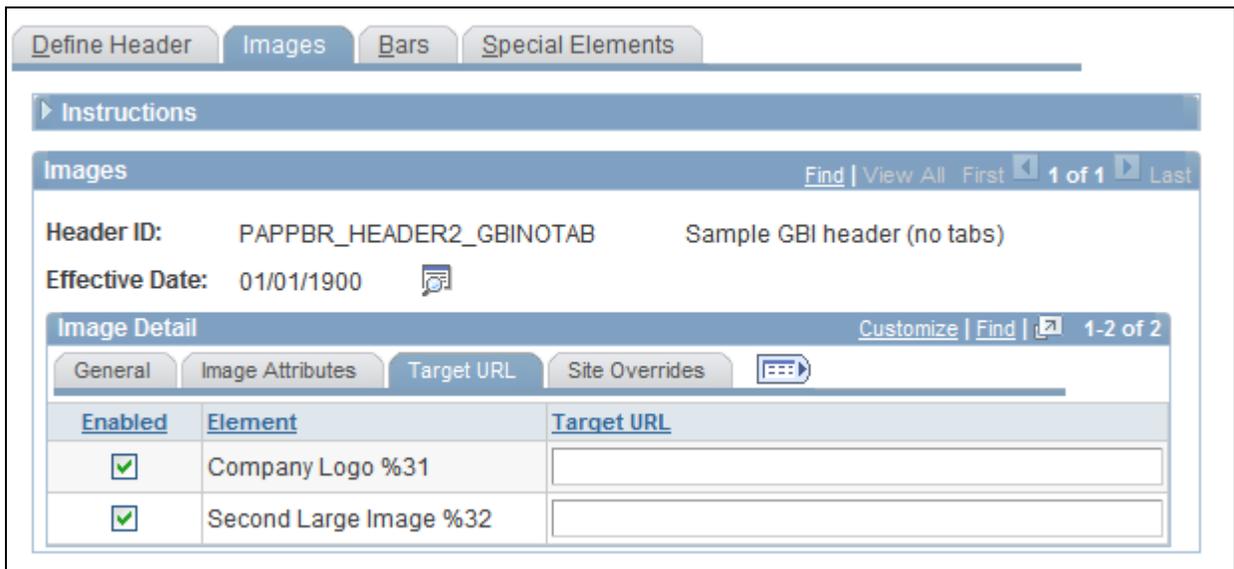
Define Header - Image page: Image Attributes tab

To refine image elements:

1. Enter the size of the image in pixels in the Height and Width fields.
2. In the Additional Attributes field, enter standard HTML tag attributes to refine the display of the image.
3. In the Hover Text field, enter the text to display at runtime when the user hovers the cursor over the image.

Specifying Target URLs for Image Elements

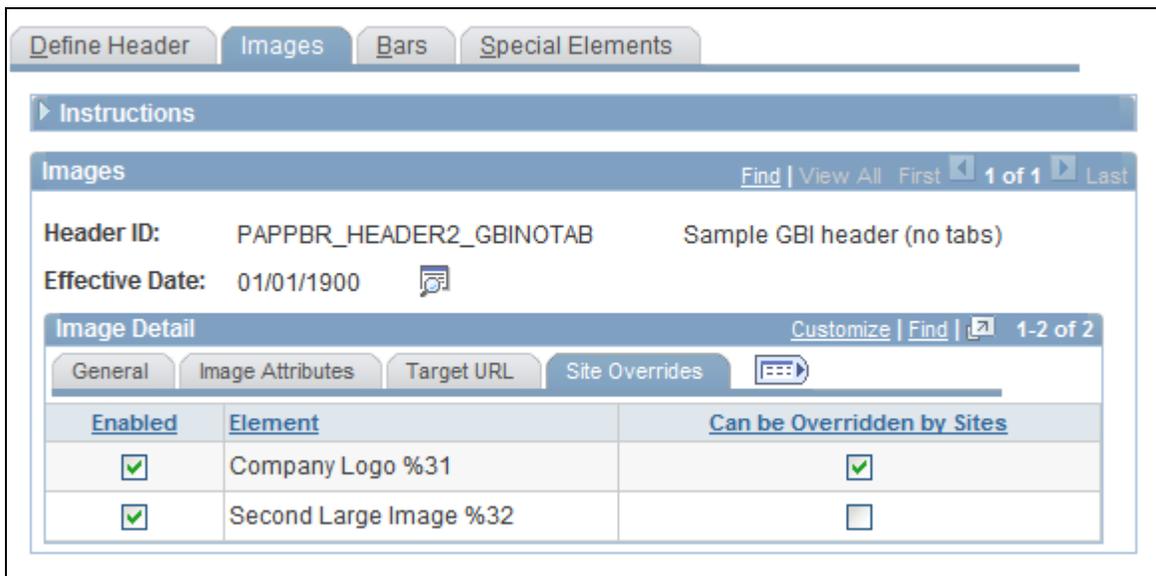
Use the Target URL tab of the Image Detail section to enter target URLs for images, if clicking the image should navigate to another URL.



Define Header - Image page: Target URL tab

Specifying Site Overrides for Image Elements

Use the Site Overrides tab of the of the Image Detail section to define elements that portal sites can potentially override.



Define Header - Image page: Site Overrides tab

Select the Can be Overridden by Sites checkbox for each element to indicate that portal sites can potentially override that element. This means the portal administrator can delegate the ability for a site administrator to override individual elements within a site.

Warning! The grid will display an Invalid Element if the assigned HTML layout definition for the header or footer has changed. When previously enabled elements are disabled in an HTML layout, headers or footers already defined may contain data that is no longer valid, since there is no longer an HTML layout element to apply and match up to it. Clear the Enabled box for elements that display as an Invalid Element.

Adding and Editing Header and Footer Bar Elements

Use the Bar tab of the Define Header page or the Define Footer page to add and edit bar elements.

The Bar Detail section enables you to assign an optional overriding style class and optional text dividers to separate bar items, as well as enter attributes to refine the display of the divider images. You can also specify if portal sites can override the bar element.

Note. The spacing between bar items is determined by the HTML objects assigned to the HTML layout. Depending on how much space is allocated to a bar element in HTML and the user's browser size, the spacing among the items on the bar will be adjusted accordingly. In instances where the space allocated in HTML is too small or the browser window gets reduced substantially, you can force spacing by configuring one of cascading style sheet (CSS) text properties in the style class assigned to the bar.

When using the Bar tab to enable and configure bar elements, you configure general information for each bar, and then click the Edit Items button to drill down and define details for each specific link or text items within the bar.

The screenshot displays the 'Define Header - Bars' page. At the top, there are tabs for 'Define Header', 'Images', 'Bars', and 'Special Elements'. The 'Bars' tab is active. Below the tabs, there is a 'Bars' section with a search bar and navigation controls. The main content area shows the following details:

- Header ID:** PAPPBR_HEADER1_BASIC
- Sample header 1**
- Effective Date:** 01/01/1900

Below this is the 'Bar Detail' section, which includes a 'General' tab and other sub-tabs like 'Divider Image', 'Divider Image Attributes', and 'Site Overrides'. A table lists the bar elements:

Enabled	Element	Style Class	Divider Text	# of Items	
<input checked="" type="checkbox"/>	Personalization Links %4	EPPBRHDRHYPERLINKCELL		5	Edit Items
<input checked="" type="checkbox"/>	Header Main Bar One %6	EPPBRHDRHYPERLINKCELL		7	Edit Items
<input checked="" type="checkbox"/>	Header Greeting Bar Two %7	EPPBRBASICGREETING		1	Edit Items

Define Header - Bars page

To enable and configure a bar element and its detailed items:

1. In the Enabled column check the Enabled box to activate the bar for the header or footer. Clear the Enabled box to disable a bar element.
2. For enabled bar elements, in the Style Class field use the Lookup button to select a style class to apply to the entire bar, or manually enter one that is defined within the HTML layout object code.

Since the bar turns into an HTML table, this style class is applied to the <TR> tag

3. In the Divider Text field, enter text to use to divide elements on the bar.
4. Click the Save button.
5. Click the Edit Items button to view and edit the following:
 - Sequence.
 - Link type of bar elements.
 - Text type of bar elements.
 - Bar element labels.
 - Associated style classes.
6. Click the OK button to return to the Bar Detail page.
7. Click the Save button.

Adding or Editing Bar Element Items

Access the Bar Detail page (click the Edit Items button on the Bars tab).

Bar Detail

Header Greeting Bar Two %7

Header ID: PAPPBR_HEADER1_BASIC Sample header 1

Effective Date: 01/01/1900

▶ Instructions

Bar Item Detail

Customize | Find | | | 1-4 of 4

General
Link Detail
Data Detail
Icon Image
Image Attributes

Seq#	Type	Label	Style Class	
4	Link to Menu Item ▼	Menu	BLUE 	Delete
3	Text from HTML ▼			Delete
2	Text from System Data ▼		EPPBRHDRTEXTSMALL 	Delete
1	Text from Welcome Message ▼		BLUE 	Delete

Add

Bar Detail page - General tab

Note. The Seq# and Type columns display on all of the tabs in the Bar Item Detail and serve as reference labels for the items that you are configuring.

The tabs and fields that display in the Bar Item Detail vary, depending on the link or text type with which you are working. For example, a Data Details tab displays when you are working with Text from System Data text types. The Link Details tab displays when you are working with a Custom Link or a Link to Menu Item link type.

Another link type with which you can work is Link to MCF/CTI (Multi-channel Framework/Computer Telephony Integration). When you implement this option, the system determines if the MCF administrative set up has been performed and if the user has access to the functionality. If so, the link will be displayed and operation can continue. If not, the link displays on the bar, however, when a user clicks on it, the following message displays: "You are not configured as MCF or CTI agent."

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Configuring Enterprise Portal," Setting Up MCF For PeopleSoft Enterprise Portal.

To add and edit bar element items:

1. Click the Add button to add a new bar element item, or simply edit the existing items.
2. In the Seq# field, enter a number to specify the order in which the bar link or text displays on the bar.

3. From the Type dropdown list, select the bar link or text type. When you select the link or text type, the tabs and fields that display vary, based on your selection. The valid options are in the list.

Those items marked with an asterisk (*) require very little configuring as they have the proper navigational links or text is generated by the system. You may need only provide styles and modify link labels for these items.

- Custom Link. (Any URL.)
 - *Link to Add Favorites. (PeopleTools feature.)
 - *Link to Add to My Links. (PeopleSoft Enterprise Portal feature.)
 - *Link to Default Portal Home. (Default portal.)
 - Link to Feeds.
 - Link to MCF/CTI Console. (PeopleTools feature.)
 - Link to Menu Item. (Portal content reference.)
 - Link to Modify Content. (PeopleTools feature.)
 - Link to Modify Layout. (PeopleTools feature.)
 - Link to Performance Trace. (PeopleTools feature.)
 - *Link to Personalize Content. (homepage Personalization, Content page.)
 - *Link to Personalize Layout. (homepage Personalization, Layout page.)
 - Link to Portal/Site Home. (Returns to a site-specific homepage; for any site created with the PeopleSoft Enterprise Portal's Create New Site wizard.)
 - *Link to Sign Out. (Executes log off.)
 - *Link to Worklist. (PeopleTools Workflow feature.)
 - Plain Text.
 - *Text from Welcome message. (User-entered data from their homepage Personalization, Content page.)
 - Text from HTML. (Based on a defined HTML object, application class or manually entered HTML.)
 - Text from System Data. (Portal.)
 - Text from Welcome Message. (PeopleTools feature.)
4. In the Label field, enter a descriptive label for the link. This label is visible to the user at runtime. Most link types will supply default labels that you can keep or modify.
 5. In the Style Class field, use the Lookup button to select a style sheet, or manually enter one that is defined within the HTML.

The Link Details tab displays when you are working with a Menu Item or Custom Link. Use this tab to select and designate a target URL for a custom link, menu item name and menu item site name.

Bar Detail

Header Greeting Bar Two %7

Header ID: PAPPBR_HEADER1_BASIC Sample header 1

Effective Date: 01/01/1900

▶ Instructions

Bar Item Detail

Customize | Find | | 1-4 of 4

General
Link Detail
Data Detail
Icon Image
Image Attributes
HTML Detail

Seq#	Type	Menu Item Site Name	Menu Item Name	
4	Link to Menu Item ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	Delete
3	Text from HTML ▼			Delete
2	Text from System Data ▼			Delete
1	Text from Welcome Message ▼			Delete

Add

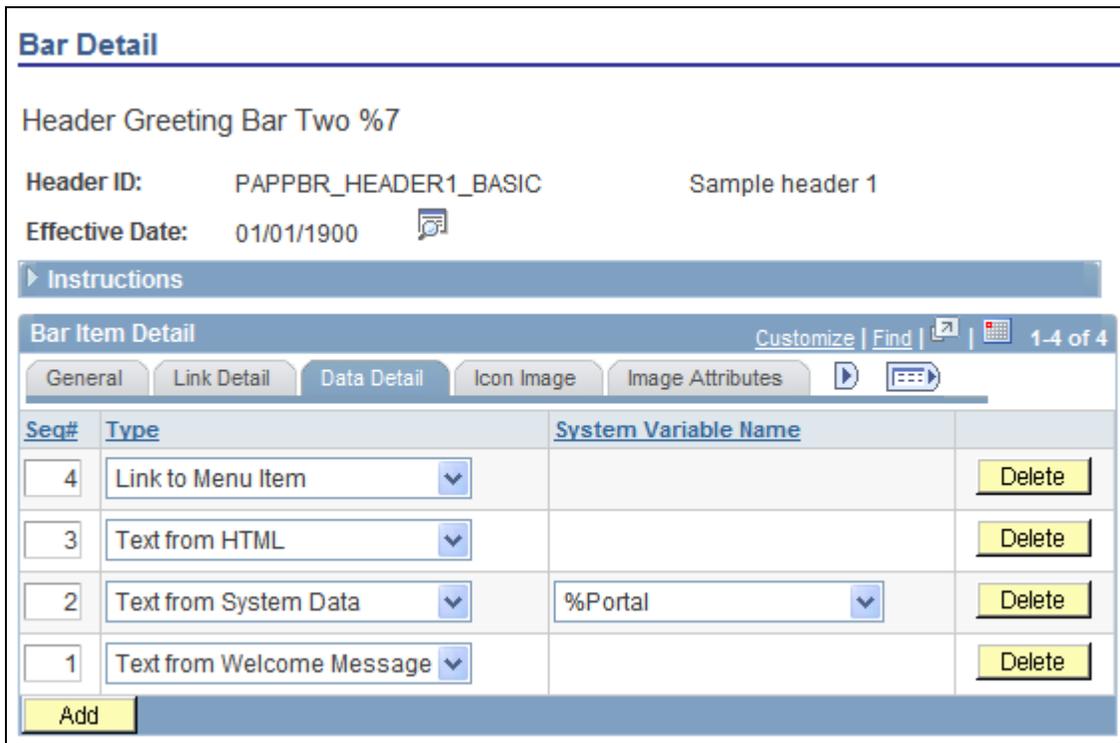
Bar Detail page: Link Detail tab

Target URL Enter any URL for the custom link.

Menu Item Site Name Select the portal site where the menu item is to reside. For example, *CUSTOMER,EMPLOYEE,SUPPLIER* and so on.

Menu Item Name Enter the content reference name or use the Lookup button to select it.

The Data Details tab displays when you are working with the type Text from System Data. Use this tab to choose a system variable type name for bar items that are text from system data.



Bar Detail page: Data Details tab

System Variable Name The valid values are:

- *%Date (2009.12.31)*. Returns a date value equal to the current server date in the format year/month/day. This information is updated when the portal header or footer is refreshed.
- *%Date (Wed, Dec 31, '09)*. Returns a date value equal to the current server date in the format day of the week/date/year. This information is updated when the portal header or footer is refreshed.
- *%Portal*. Returns the name of the portal through which the current service is being accessed. A string value is returned.
- *%Time*. Returns the time on the server when the page was created or refreshed. This information is updated when the portal header or footer is refreshed.
- *%DBName*. Returns the name of the current database as a String value.
- *%UserDescr*. Returns the description, if any, listed for the current user. The description is set up under the security user profile when the User ID is set up.
- *%UserID*. Returns a character string containing the user currently logged on. This is typically used to restrict access to records or fields to specific users.

Sometimes you may want to pair an image next to a hyperlink and have both access the same URL. Use the Icon Image tab to specify information for icon images, including the image source and image object name. Icon images display just to the left of the bar item link or text.

Bar Detail

Header Greeting Bar Two %7

Header ID: PAPPBR_HEADER1_BASIC Sample header 1

Effective Date: 01/01/1900

▶ Instructions

Bar Item Detail

Customize | Find | | 1-4 of 4

General
Link Detail
Data Detail
Icon Image
Image Attributes
HTML Detail

Seq#	Type	Image Source	Preview	Image Object Name	Browse Image Catalog	
4	Link to Menu Item ▼	Catalog ▼		<input style="width: 100%;" type="text"/>		Delete
3	Text from HTML ▼					Delete
2	Text from System Data ▼					Delete
1	Text from Welcome Message ▼					Delete

Add

Bar Detail page: Icon Image tab

To specify the image source for an icon image:

1. From the Image Source dropdown list, select a source. The valid options are:
 - Image Catalog
 - URL
2. If the source is *Catalog*, in the Image Object Name field, enter the name of the image object to display for the icon, or use the Browse Image Catalog button to search for one.

The image displays in the Preview column.

3. If the source is URL, in the Image URL field, enter the location of the icon image.

Use the Image Attributes tab to refine the display details for bar detail icons.

Bar Detail

Header Greeting Bar Two %7

Header ID: PAPPBR_HEADER1_BASIC Sample header 1

Effective Date: 01/01/1900

▶ Instructions

Bar Item Detail Customize | Find | 1-4 of 4

General Link Detail Data Detail Icon Image **Image Attributes** HTML Detail

Seq#	Type	Height	Width	Additional Attributes	
4	Link to Menu Item				Delete
3	Text from HTML				Delete
2	Text from System Data				Delete
1	Text from Welcome Message				Delete

Add

Bar Detail page: Image Attributes tab

In the Image Attributes field, specify standard HTML tag attributes to refine the display of the bar images as well as height and width parameters.

The HTML Detail tab displays when you are working with text from HTML. The tab enables you to select the source of the HTML and specify the required details to supply the code.

Bar Detail

Header Greeting Bar Two %7

Header ID: PAPPBR_HEADER1_BASIC Sample header 1

Effective Date: 01/01/1900 

▶ Instructions

Bar Item Detail Customize | Find |  |  1-4 of 4

General | Link Detail | Data Detail | Icon Image | Image Attributes | **HTML Detail** 

Seq#	Type	HTML Source	HTML Object Name	
4	Link to Menu Item			Delete
3	Text from HTML	Catalog	<input type="text"/> 	Delete
2	Text from System Data			Delete
1	Text from Welcome Message			Delete

Add

Bar Detail page: HTML Detail tab

HTML Source

Source of the text HTML. Valid choices are:

- *Appl Class*. Application class in Application Designer.
- *Catalog*. Object from HTML catalog in Application Designer.
- *External*. HTML code is entered here.

Note. The *Appl Class* option is useful for dynamically generated HTML, like a stock quote or clock. JavaScript can be used with the *Catalog* and *External* HTML source option to create dynamically changing content, but the *Appl Class* option is the only option that allows the HTML itself to be dynamically generated.

AppPackage, AppClass, Method

Displays when the HTML source is *Appl Class*.

The application class method must return an HTML string. Enter the information in the following format:

```
AppPackageName : AppClassName : MethodName
```

For example:

```
EPPBR_BRANDING : HTMLWrappers : StockQuote
```

HTML Object Name

Displays when the HTML source is *Catalog*. Enter the HTML object name or use the Lookup button to search for one.

HTML Area Displays when the HTML source is *External*. Click the link to compose or copy and paste your own HTML or JavaScript code.

Click OK to return to the Bar Details section and save your changes.

This concludes working with Bar Item Details. The following section resumes discussing Bar Details, specifically, divider images.

Defining Divider Images

Use the Divider Image tab in the Bar Detail section of the Bars page to define images to use to divide bar items. Using text dividers is an alternative to using image dividers, however, you may use both types of dividers.

Enabled	Element	Image Source	Preview	Image Object Name	Browse Image Catalog
<input checked="" type="checkbox"/>	Personalization Links %4	Catalog			
<input checked="" type="checkbox"/>	Header Main Bar One %6	Catalog			
<input checked="" type="checkbox"/>	Header Greeting Bar Two %7	Catalog			

Define Header - Bars page: Divider Image tab

To specify the image source for a divider image:

- From the Image Source dropdown list, select a source. The valid options are:
 - Image Catalog
 - URL
- If the source is *Catalog*, in the Image Object Name field, enter the name of the image object to display for the icon, or use the Browse Image Catalog button to search for one.
- If the source is *URL*, in the Image URL field, enter the location of the icon image.

Refining Divider Images

Use the Divider Image Attributes tab of the Bar Detail section to refine the display of divider images.

Define Header - Bars page: Divider Image Attributes tab

Header ID: PAPPBR_HEADER1_BASIC Sample header 1
Effective Date: 01/01/1900

Bar Detail Customize | Find | 1-3 of 3

General Divider Image Divider Image Attributes Site Overrides

Enabled	Element	Height	Width	Additional Attributes
<input checked="" type="checkbox"/>	Personalization Links %4			
<input checked="" type="checkbox"/>	Header Main Bar One %6		100	
<input checked="" type="checkbox"/>	Header Greeting Bar Two %7			

Define Header - Bars page: Divider Image Attributes tab

In the Image Attributes field, specify standard HTML tag attributes to refine the display of the divider images. In the Height and Width fields, enter size parameters for the image.

Overriding Bar Elements

Use the Site Overrides tab of the of the Bar Detail section on the Bars page to specify bar elements that portal sites can override.

Define Header - Bars page: Site Overrides tab

Header ID: PAPPBR_HEADER1_BASIC Sample header 1
Effective Date: 01/01/1900

Bar Detail Customize | Find | 1-3 of 3

General Divider Image Divider Image Attributes Site Overrides

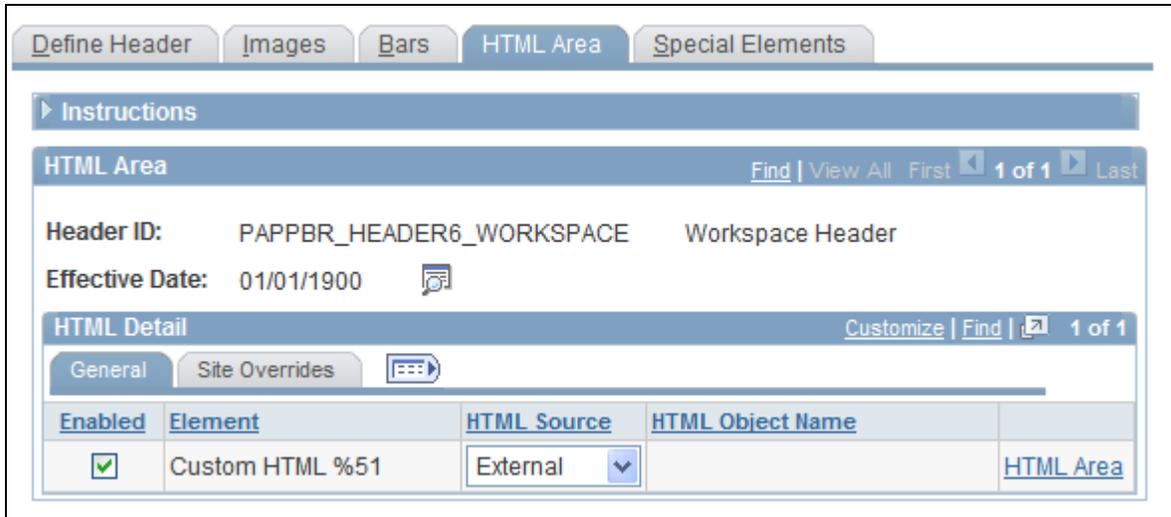
Enabled	Element	Can be Overridden by Sites
<input checked="" type="checkbox"/>	Personalization Links %4	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Header Main Bar One %6	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Header Greeting Bar Two %7	<input checked="" type="checkbox"/>

Define Header - Bars page: Site Overrides tab

To specify that portal sites can override a bar element, select the Can be Overridden by Sites checkbox.

Enabling HTML Area Elements in Headers and Footers

Use the HTML Area page to enable HTML elements used in headers or footers. In addition, use this tab to assign an HTML reference to each enabled HTML Area element or edit your own reference. You may also specify whether portal sites can override HTML elements that you specify.



Define Header - HTML Area page

HTML Source

Source of the text HTML. The valid options are:

- *Appl Class*. Application class in Application Designer.
- *Catalog*. HTML catalog in Application Designer.
- *External*. HTML code.

Note. The *Appl Class* option is useful for dynamically generated HTML, like a stock quote or clock. JavaScript can be used with the *Catalog* and *External* HTML source option to create dynamically changing content, but the *Appl Class* option is the only option that allows the HTML itself to be dynamically generated.

AppPackage, AppClass, Method

Displays when the HTML source is *Appl Class*. Enter the application class method name. The method must return an HTML string. Enter the information in the following format:

AppPackageName : AppClassName : MethodName

For example:

EPPBR_BRANDING : HTMLWrappers : StockQuote

HTML Object Name

Displays when the HTML source is *Catalog*. Enter an HTML object name or use the Lookup button to search for one.

HTML Area

Displays when the HTML source is *External*. Click the link to compose or copy and paste your own HTML or JavaScript code.

Defining Special Bar Elements (Headers Only)

Use the Special Elements page to define special elements you place on header bars, such as My Links, Search and Scoped Search options, homepage Help and homepage tab displays.

For example, you can use this tab to enter a homepage Help display label and optional style classes. You can also configure the details about Search Options and Scoped Search Options and homepage tab display, enter attributes to refine the display of these elements, and indicate if portal sites can override any of the elements.

PeopleSoft delivers all special elements configured with code to handle their underlying functionality and display layout. You can configure only the labeling, images, and style attributes of special elements. Use the tabs in the Setup Detail section of the tab to configure these items.

The screenshot shows the 'Special Elements' tab in the 'Define Header' setup page. The page is titled 'Special Elements' and shows a table of elements. The table has columns for 'Enabled', 'Element', 'Label', and 'Style Class'. The 'My Links %1' element is enabled and has a label 'My Links:' and style class 'EPPBRHDRHYPERLINK'. Other elements include 'Search Options %2', 'Homepage Help Display %3', 'Homepage Tab Display %5', and 'Scope Search Options %2'. The 'Style Class' column has a 'Look Up' button next to each entry. The 'Edit Options' button is visible for the 'Search Options %2', 'Homepage Tab Display %5', and 'Scope Search Options %2' elements.

Enabled	Element	Label	Style Class
<input checked="" type="checkbox"/>	My Links %1	My Links:	EPPBRHDRHYPERLINK
<input type="checkbox"/>	Search Options %2		
<input checked="" type="checkbox"/>	Homepage Help Display %3	Homepage Help	EPPBRHDRHELP
<input checked="" type="checkbox"/>	Homepage Tab Display %5		
<input checked="" type="checkbox"/>	Scope Search Options %2		

Define Header - Special Elements tab

To define special bar elements:

1. Check the Enabled box to enable a special element, or clear the Enabled box to disable a special element.
2. If working with the My Links or Homepage Help Display elements, enter a label for the link display. The label appears to users at runtime.
3. In the Style Class field, use the Lookup button to select a style class, or manually enter one that is defined within the HTML.

- Click the Edit Options button to apply images and image attributes for the Search Options and Homepage Tab Display elements.

See the following sections on Defining Search Option Elements and Defining Homepage Tab Display Elements for more information.

- Click the OK button to return to the Special Elements page.
- Click the Save button.

Defining Search Option Elements

When you click the Edit Options button for a Search Options element on the Define Header - Special Elements page, a Search Options page displays where you can specify images and image attributes for the Search Options element. Note that the Label and Style Class fields display, as well as any values you have entered for them.

Type	Label	Style Class	Image Source	Preview	Image Object Name	Browse Image Catalog
Search Label	<input type="text"/>	<input type="text"/>				
Text Entry Box	Search	EPPBRHDREDITBOX				
Search Icon			Catalog		PS_EPPBR_ARROW	
Search Scope		EPPBRHDREDITBOX				

Scope Search Options page: General tab

To specify the image source for the Search Options Go button:

- From the Image Source dropdown list, select a source. The valid options are:
 - Image Catalog*. The source of the image is the Application Designer Image Catalog.
 - URL*. The source of the image is a URL.
- If the source is *Catalog*, in the Image Object Name field, enter the name of the image object to display for the icon, or use the Browse Image Catalog button to search for one.

The image appears in the Preview column.
- If the source is *URL*, in the Image URL field, enter the location of the icon image.

Refining Search Options Images

Use the Image Attributes tab to refine the display of Search Option images.

Search

Scope Search Options %2

Header ID: PAPPBR_HEADER1_BASIC Sample header 1

Effective Date: 01/01/1900 

▶ Instructions

Search Options Customize | Find |  |  1-4 of 4

General **Image Attributes** 

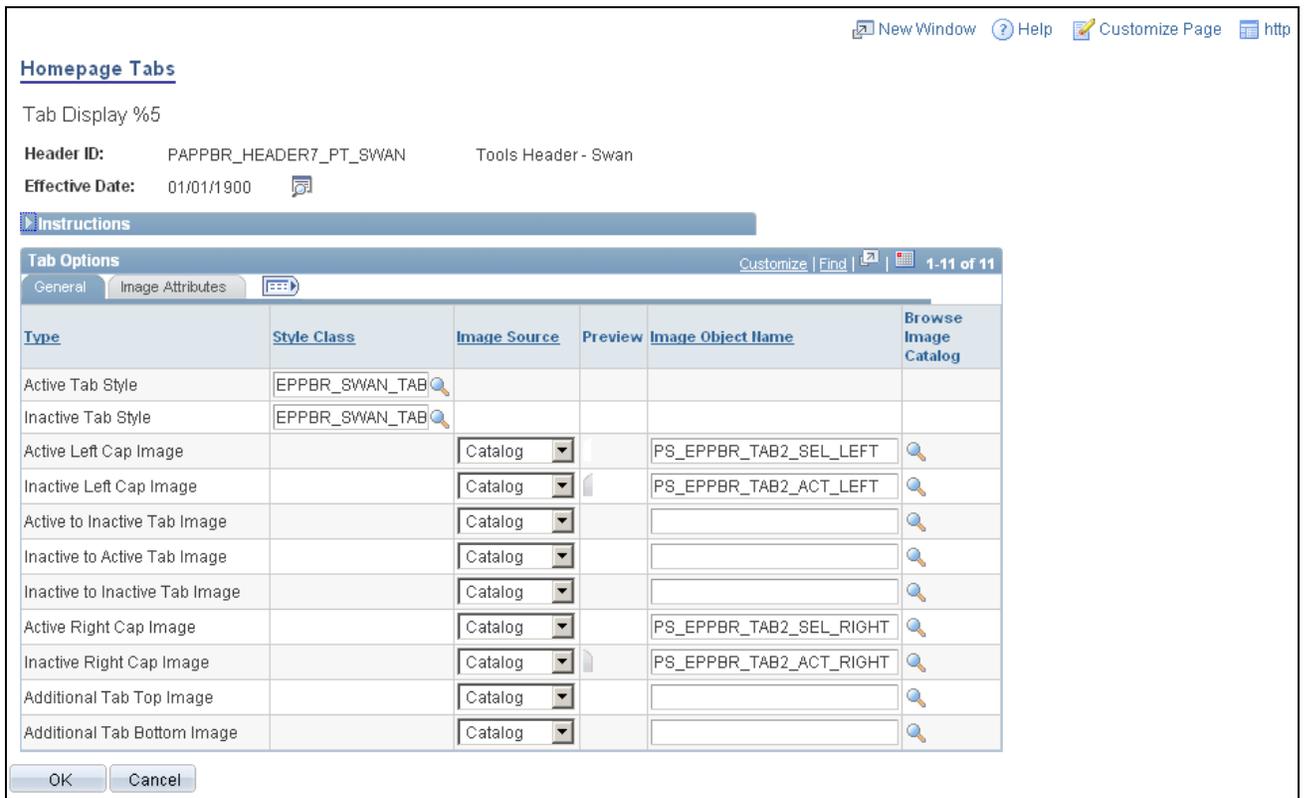
Type	Height	Width	Additional Attributes	Hover Text
Search Label				
Text Entry Box				
Search Icon	<input type="text"/>	<input type="text"/>	align="right" border="0"	<input type="text"/>
Search Scope				

Scope Search Options page: Image Attributes tab

In the Image Attributes field, specify standard HTML attributes to refine the display of the search icon.

Defining Homepage Tab Display Options

When you click the Edit Options button for a Homepage Tab Display element on the Define Header - Special Elements page, a Tab Options page displays where you can specify images and image attributes for the Homepage Tab Display element.



Tab Options page: General Tab

The tab option Types that you can configure correspond to those shown in the following lists and graphics. Note that for a complete configuration, you must configure all tab option Types, except for the *Additional Tab Top Image* and the *Additional Tab Bottom Image*.

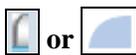
Active Tab Style Controls the font style for the tab label of the currently displayed homepage tab.

Inactive Tab Style Controls the font style for the tab label of the homepage tabs that are not selected.



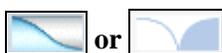
Active left cap image.

The two active left cap examples shown here for comparison are CURVED and BASIC.



Inactive left cap image.

The two inactive left cap examples shown here for comparison are CURVED and BASIC.



Active to inactive tab image.

The two active to inactive tab examples shown here for comparison are CURVED and BASIC.



Active to active tab image.

The two active to active tab examples shown here for comparison are CURVED and BASIC.



Inactive to inactive tab image.

The two inactive to inactive tab examples shown here for comparison are CURVED and BASIC.



Active right cap image.

The two active right cap examples shown here for comparison are CURVED and BASIC.



Inactive right cap image.

The two inactive right cap examples shown here for comparison are CURVED and BASIC.

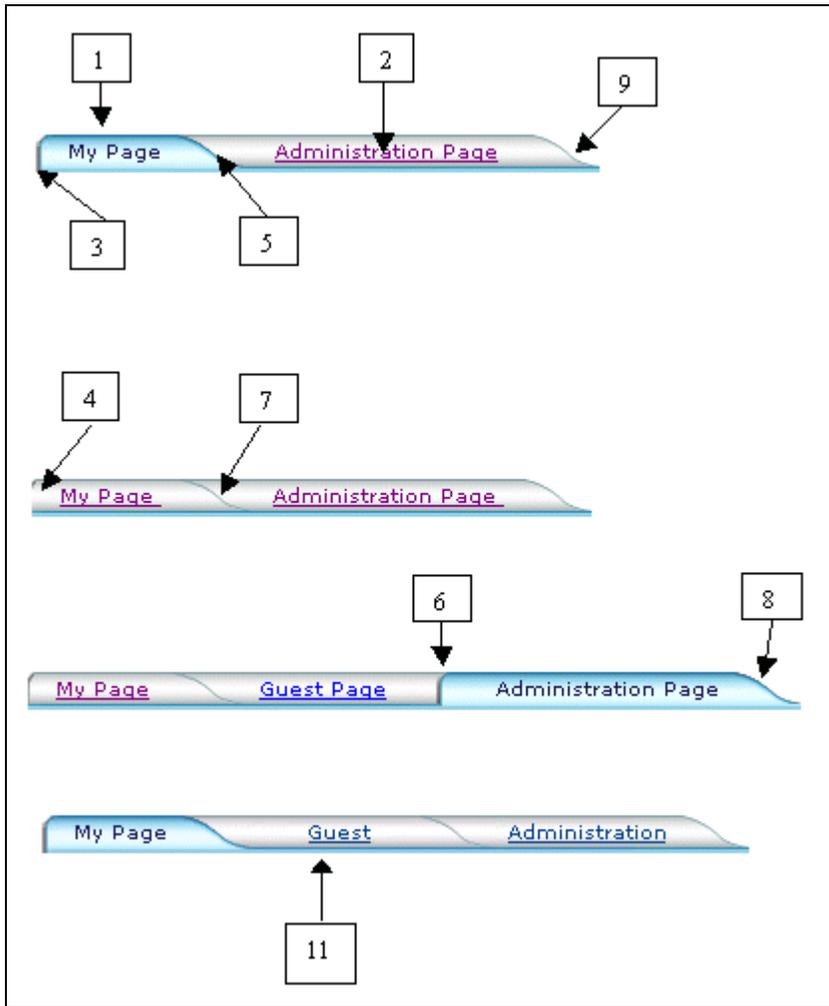
Additional Tab Top Image

Use at the top of the homepage tab display so that the tops of the images fit together seamlessly.

Additional Tab Bottom Image

Use at the bottom of the homepage tab display so that the bottom of the images fit together seamlessly.

The following graphic shows the tab types assembled to construct homepage tabs.



Homepage tab option types

The preceding graphic shows the following homepage tab option types.

<i>Homepage Tab Option Type</i>	<i>Description</i>
1	Active tab style.
2	Inactive tab style.
3	Active left cap image.
4	Inactive left cap image.
5	Active to inactive cap image.

Homepage Tab Option Type	Description
6	Active to active cap image.
7	Inactive to inactive cap image.
8	Active right cap image.
9	Inactive right cap image.
10	Additional tab top image. (Not shown in graphic.)
11	Additional tab bottom image.

To define homepage tab display options:

1. If working with the Active Tab Style or Inactive Tab Style homepage tab display option Type, in the Style Class field, click the Lookup button to select a style class.
2. For all other homepage tab display option types, from the Image Source dropdown list, select an image source. The valid options are:
 - *Catalog*. The source of the image is from the Application Designer Image Catalog.
 - *URL*. The source of the image is a URL.
3. If the source is *Catalog*, in the Image Object Name field, enter the name of the image object, or use the Browse Image Catalog button to search for one.
4. If the source is *URL*, in the Image URL field, enter the location the image.
5. Click OK to return to the Special Elements tab. Save your changes.

Refining Image Attributes

Use the Image Attributes tab to enter optional attributes to refine the display of the special elements.

Homepage Tabs

Homepage Tab Display %5

Header ID: PAPPBR_HEADER1_BASIC Sample header 1

Effective Date: 01/01/1900 

▶ Instructions

Tab Options Customize | Find |  |  1-11 of 11

General **Image Attributes** 

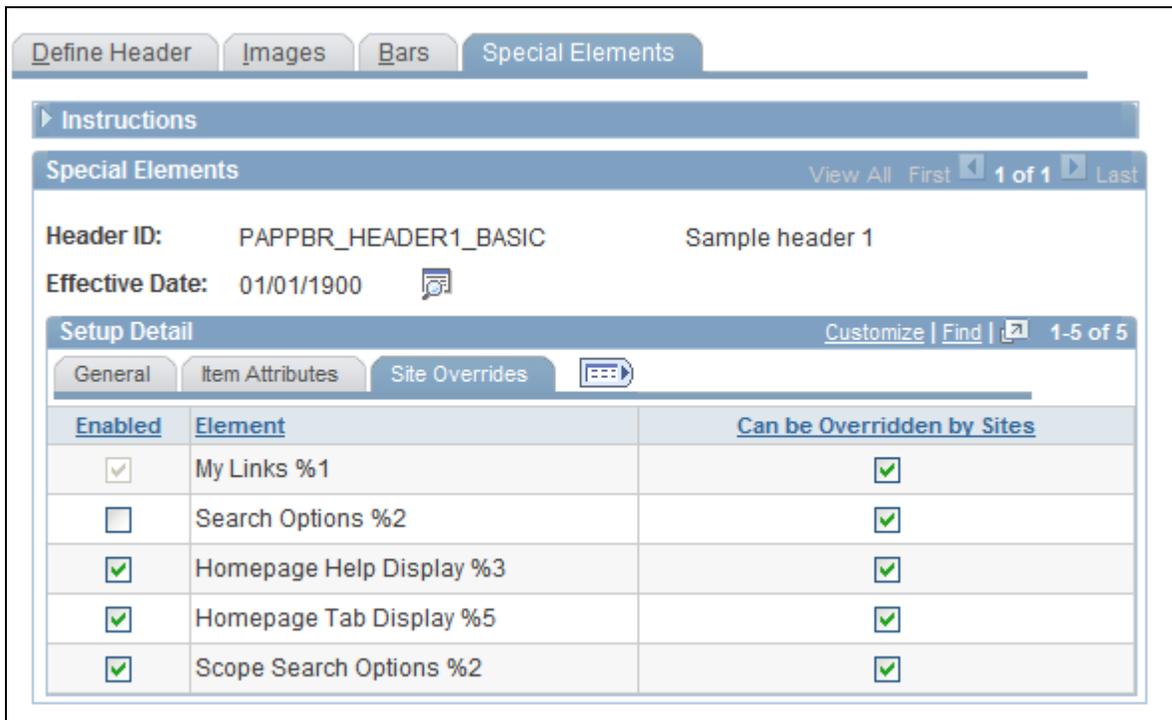
Type	Height	Width	Additional Attributes
Active Tab Style			
Inactive Tab Style			
Active Left Cap Image	16		valign="top"
Inactive Left Cap Image	16		valign="top"
Active to Inactive Tab Image	16		valign="top"
Inactive to Active Tab Image	16		valign="top"
Inactive to Inactive Tab Image	16		valign="top"
Active Right Cap Image	16		valign="top"
Inactive Right Cap Image	16		valign="top"
Additional Tab Top Image	17		valign="top"
Additional Tab Bottom Image	17		valign="top"

Tab Options page: Image Attributes tab

In the Attributes field, specify standard HTML attributes to refine the display of the bar images. In addition, enter height and width parameters.

Overriding Special Elements

Use the Site Override tab to define those elements which portal sites can override.



Special Elements page: Site Overrides tab

Select the Can be Overridden by Sites checkbox to indicate that portal sites can override the element.

Creating Dated Versions of Headers and Footers

You can create dated versions of headers and footers and apply them to a theme for company promotions, company events, holidays and so on.

To do so, you create separate instances of headers and footers and then apply effective dates to them. Then, at runtime, specific headers or footers are added to a theme based on the effective date.

See [Chapter 10, "Understanding Branding Theme Development and Deployment," Using Effective Dating to Create Branding Themes Versions, page 131.](#)

Note. You must create new headers and footers to take effect when you want the current versioned header or footer to end. The portal will not rollback to the previous header or footer.

To create dated versions of headers and footers:

1. Access the header or footer to version.
 - To version a header, access the Define Header page by selecting Portal Administration, Branding, Define Headers and select a header. The Define Header page displays.
 - To version a footer, access the Define Footer page by selecting Portal Administration, Branding, Define Footers and select a footer. The Define Footer page displays.
2. Click the Add button to add another version of the header or footer.

3. In the Effective Date field, enter a date or click the calendar icon to specify when the version of the header or footer should take effect.
4. Save the new version of the header or footer.

Click the View All link or the Show Next Row and Show Previous buttons to view all versioned headers or footers.

Continue to configure the header or footer as appropriate.

Note. After you create versioned headers and footers, take care to note the effective date for each to ensure that you configure the correct version.

Deleting Headers and Footers

PeopleSoft recommends that you do not delete headers or footers, since in doing so you may disrupt theme definition used throughout the portal database.

If you must delete a header or footer, you should thoroughly research where it may be in use and understand the consequences of deleting it from the system. The branding queries can help you in this research.

See [Chapter 12, "Running Branding Queries," page 139](#).

After you have completed all the research, the portal administrator can delete header and footer data in SQL by executing a DELETE command against the appropriate records.

Defining Branding Overrides

This section describes how to:

- Override the homepage header.
- Override the homepage header image.
- Upload an image to the image catalog.
- Override the target page header.
- Overriding MyLinks.
- Overriding images.
- Overriding the homepage Help.
- Override homepage footers.

Pages Used to Override Site Branding and Workspace Elements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Override Homepage Header	EPPSM_BR_MAIN	From within a site: Portal Administration, Branding, Override Homepage Header From within a site: Site Manager Center, Override Homepage Header	Use this page to enable overrides in header site branding elements.
Preview Site Branding Overrides	EPPSM_HDR_PREVIEW	 Click the Preview Site Branding button.	View the results of the overrides.
Override Homepage Header — Image	EPPSM_BR_IMG	 Click the Override Options button. to the right of the image on the page.	Use this page to override and upload replacement images.
Image Catalog	EO_PE_ADDIMAGE_SEC	After changing to Correction mode, click the Upload New Image link on the Override Homepage Header — Image page.	Use this page to upload images to the image catalog and use them to override existing images.
Override Homepage Header — Bar	EPPSM_BR_BAR	Click the Override Options icon to the right of the bar on the Override Homepage Header page.	Use this page to change bars on the page.
Override Homepage Header — Homepage Help	EPPSM_BR_HELP	Click the Override Options icon to the right of the help link on the Override Homepage Header page.	Use this page to set override options for Help.
View My Links	EPPSC_VIEW_MYSC	Click the Override Options icon to the right of My Links to view the links.	Use this page to set override options for My Links.
Edit My Links	EPPSC_VIEW_MYSC	Click the Edit My Links button on the View My Links page.	Use this page to edit or add links to the My Links page.
Override Target Page Header	EPPSM_BR_MAIN	From within a site: Portal Administration, Branding, Override Target Page Header. From within a site: Site Manager Center, Override Target Page Header	Use this page to change elements of the target page that can be overridden.

Page Name	Definition Name	Navigation	Usage
Override Homepage Footer	EPPSM_BR_ADD	From within a site: Portal Administration, Branding, Override Homepage Footer From within a site: Site Manager Center, Override Homepage Footer	Use this page to change the elements of the homepage footer that can be overridden.

Overriding the Homepage Header

Access the Override Homepage Header page (From within a site: Portal Administration, Branding, Override Homepage Header).

Override Homepage Header page

Elements in the header that can be overridden are identified by the Override Options icon. Start by selecting an effective date for when you want the overrides to take effect. All overrides on the page are set using this field.



The Override Options icon identifies any element that can be changed on the page.

Effective Date

Use this field to specify the date that the header or footer should take effect.



Click the Preview Site Branding icon to see the appearance of the branding elements on the page.

Add

Click the Add button to create another effective-dated version of the header.

Delete

Click the Delete button to remove the selected version of the header.

Overriding the Homepage Header Image

Access the Override Homepage Header - Image page (click the Override Options icon to the right of the custom image on the Override Homepage Header page).

Override Homepage Header

Image

Custom Image 31

Effective Date: 01/01/1900

Display Option: Use Default
 Override
 Do Not Show

Image Source:

Image Name: [Upload New Image](#)

▼ Advanced

Height: Width:

Additional Attributes:

Target URL:

Hover Text:

Override Homepage Header - Image page

Note. You must be in Correction mode to make changes to this page.

Display Option	Select the option for the image. Available values are: <i>Use Default.</i> The existing image appears in the header. <i>Override.</i> You can select and upload another image to replace the existing one. <i>Do Not Show.</i> No image appears in the header.
Image Source	Select the source for the image. Available values are: <i>External Source.</i> You can specify a URL to the location of the image. <i>System Catalog.</i> You can enter the name of the image as found in the system catalog.
Image Name	Select the name of the image as found in the system catalog.
Image URL	Enter the URL for the location of the image.
Upload New Image	Select this link to display the Image Catalog page, which is used to upload remote images to the system catalog.

Advanced Options

Use the Advanced group box to specify additional information for the image.

Height	Enter the height of the image in pixels.
Width	Enter the width of the image in pixels.
Additional Attributes	Specify standard HTML tag attributes to refine the display of element images.
Target URL	Enter a target URL that the user will access when the image is clicked. If you don't want the image to be "clickable" or act like a hyperlink, leave this blank.
Hover Text	Enter text to display at runtime when a user hovers over an image.

Uploading an Image to the Image Catalog

Access the Image Catalog page (click the Upload New Image link on the Override Homepage Header - Image page).

Image Catalog

Enter the Image Name, Description, and the File Type of the image to stored in the Image System Catalog. You will be prompted to upload the file after the file type is selected. Click OK to save and return to the main page.

Image Upload Options

*Name:

Description:

*Image Type: ▼

Override Homepage Header - Image Catalog page

Note. You must be in Correction mode to make changes to this page.

1. Enter the name, description, and file type of the image you are uploading.
2. Click OK

A standard browse window will enable you to browse through the directories on your machine and select the location of the file you are uploading.

3. Click Upload and the system uploads and saves the image to the Image Catalog.

Overriding My Links

Access the Override Homepage Header - My Links page (click the Override Options icon to the right of the My Links drop-down list on the Override Homepage Header page) or the Override Target Page Header - My Links page (click the Override Options icon to the right of the My Links drop-down list on the Override Target Page Header page).

Override Homepage Header

My Links

My Links %1

Effective Date: 01/01/1900

Display Option:

Use Default
 Override
 Do Not Show

Label:

Style Class:

Attributes:

Override Homepage Header - My Links page

Note. You must be in Correction mode to make changes to this page.

- | | |
|-----------------------|--|
| Effective Date | Use this field to specify the date that the override should take effect. |
| Display Option | <p>Select the display options for My Links. Available values are:</p> <p><i>Use Default.</i> The existing My Links appears in the header.</p> <p><i>Override.</i> You can change the style class, label, and attributes for the link.</p> <p><i>Do Not Show.</i> My Links does not appear in the header. If you select this option, you will still see My Links on the main screen so that you can access the page to configure the element.</p> |
| Label | Enter a label for the link display. The label appears to users at runtime. |
| Style Class | Enter the class name associated with the override. |
| Attributes | Specify standard HTML tag attributes to refine the display the My Links element. |

Overriding the Homepage Help

Access the Override Homepage Header - Homepage Help page (click the Override Options icon to the right of the Homepage Help link on the Override Homepage Header page).

Override Homepage Header

Homepage Help

Homepage Help Display %3

Effective Date: 01/01/1900

Display Option: Use Default
 Override
 Do Not Show

Label:

Style Class: 

Attributes:

Save Cancel Correction

Override Homepage Header - Homepage Help page

Note. You must be in Correction mode to make changes to this page.

Effective Date	Use this field to specify the date that the override should take effect.
Display Option	Select the display options for Homepage Help. Available values are: <i>Use Default.</i> The existing Homepage Help link appears in the header. <i>Override.</i> You can select another style class and attributes to replace the existing one. <i>Do Not Show.</i> Homepage Help does not appear in the header. If you select this option, you will still see the help link on the main screen so that you can access the page to configure the element.
Label	Enter a label for the link display. The label appears to users at runtime.
Style Class	Enter the class name associated with the override.
Attributes	Specify standard HTML tag attributes to refine the display the Homepage Help element.

Overriding Bars

Access the Override Homepage Header - Bar page (click the Override Options icon toward the right end of the bar on the Override Homepage Header page).

Override Homepage Header

Bar

Top Right Override Bar One %8

Effective Date: 01/01/1900

Display Option: Use Default
 Override
 Do Not Show

Style Class:

Divider Text: [Divider Image](#)

Bar Item Detail					
Customize Find First 1-3 of 3 Last					
System Hyperlink Type	Label	Seq#	Style Class	Details	
Link to Portal/Site Home	Facilities	2	GBIHEADERLINI	Details	Delete
Link to Default Portal Home	Portal Home	1	GBIHEADERLINI	Details	Delete
Plain Text	 	3	GBIHEADERLINI	Details	Delete

[Add](#)

Override Homepage Header - Bar page

Note. You must be in Correction mode to make changes to this page.

When you click the Edit Items button for a bar element, the Bar Item Detail page displays.

Note. The Seq# and Type columns display on all of the tabs in the Bar Item Detail and serve as reference labels for the items that you are configuring.

The tabs and fields that display in the Bar Item Detail vary, depending on the link or text type with which you are working. For example, a Data Details tab displays when you are working with Text from System Data text types. The Link Details tab displays when you are working with a Custom Link or a Link to Menu Item link type.

Another link type with which you can work is Link to MCF/CTI (Multi-channel Framework/Computer Telephony Integration). When you implement this option, the system determines if the MCF administrative set up has been performed and if the user has access to the functionality. If so, the link will be displayed and operation can continue. If not, the link displays on the bar, however, when a user clicks on it, the following message displays: "You are not configured as MCF or CTI agent."

Overriding the Target Page Header

Access the Override Target Page Header page (from within a site: Portal Administration, Branding, Override Target Page Header).

Override Target Page Header

Instructions

The override icon to the right of a branding element indicates that the element is overridable. Click on the Override Option icon in order to make changes to the element.

The Add button allows creation of newly dated versions to support the staging of future changes. Use the View All link to review all existing versions. Use Correction to edit the current or past versions.

 Override Options
 Preview Site Branding

Detail Find | View All | First 1 of 1 Last

*Effective Date: 

Welcome VP1 Fri, Jul 17, 09 Search:  [Back to Portal](#) | [Facilities](#) |  [Add to My Links](#) | [Sign out](#)





My Links:   [Homepage Help](#)

Override Target Page Header page

Note. You must be in Correction mode to make changes to this page.

This page enables you to override elements in the header of the target page.

Elements in the header that can be overridden are identified by the Override Options icon. Start by selecting an effective date for when you want the overrides to take effect. All overrides on the page are set using this field.



The Override Options icon identifies any element that can be changed on the page.

Effective Date

Use this field to specify the date that the header or footer should take effect.



Click the Preview Site Branding icon to see the appearance of the branding elements on the page.

Add

Click the Add button to create another effective-dated version of the header.

Delete

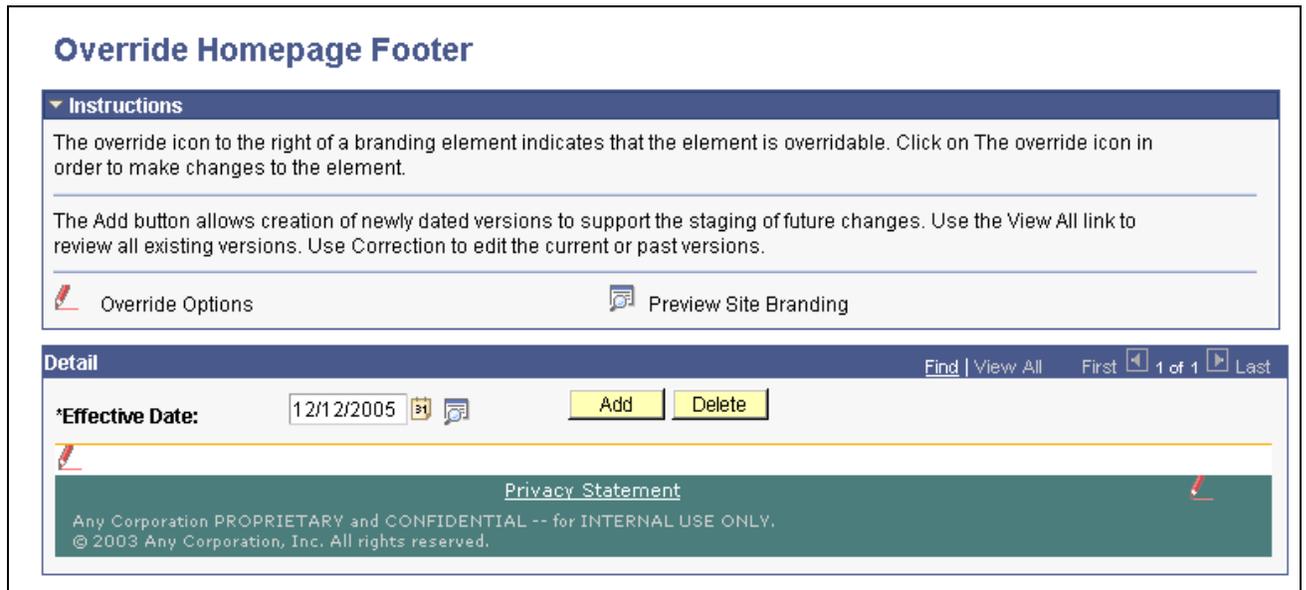
Click the Delete button to remove the selected version of the header.

See [Chapter 7, "Configuring and Assembling Branding Themes," Overriding the Homepage Header, page 92.](#)

Overriding Homepage Footers

Access the Override Homepage Footer page (from within a site: Portal Administration, Branding, Override Homepage Footer).

Note. If there isn't a footer associated with the Homepage, the system will not save the Effective Date and will not display the Override Homepage Footer page.



Override Homepage Footer page

Elements in the header that can be overridden are identified by the Override Options icon. Start by selecting an effective date for when you want the overrides to take effect. All overrides on the page are set using this field.



The Override Options icon identifies any element that can be changed on the page.

Effective Date

Use this field to specify the date that the footer should take effect.



Click the Preview Site Branding icon to see the appearance of the branding elements on the page.

Add

Click the Add button to create another effective-dated version of the footer.

Delete

Click the Delete button to remove the selected version of the footer.

Defining Overrides for Menu Styles

This section provides a list of common elements and pages used to define menu overrides and describes how to:

- Preview menu pagelet overrides.
- Define menu style sheet overrides.
- Define Background style and image overrides.
- Select folder style and image overrides.
- Define target link style and images overrides.
- Define other menu image overrides.

Common Elements Used to Define Menu Styles



Click the button to display or hide instructional text, or expand or collapse individual sections used to define menu styles.

Expand All

Click the button to expand all sections used to define menu styles.

Collapse All

Click the button to collapse all sections used to define menu styles.



Click the Lookup button to look up predefined values or images.



Click the button to browse for images in the Application Designer Image Catalog.

Pages Used to Define Menu Overrides

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Menu Overrides	EPPBR_MENUNAV	Portal Administration, Branding, Define Menu Styles, Define Menu Overrides	Assign overriding menu pagelet images and styles.

Understanding Menu Overrides

The Define Menu Overrides page enables you to assign overriding styles and images for a restyled version of the default PeopleSoft Enterprise Menu navigation pagelet. The basic PeopleTools default style and image values apply when no overrides are assigned. Each collapsible section on the Define Menu Overrides page displays different information about the menu overrides including:

- A preview of the menu
- Menu background styles and images
- Folder styles and images
- Target link styles and images
- Other images like indentation spacer images

Previewing Menu Overrides

Access the Define Menu Overrides page (Portal Administration, Branding, Define Menu Styles, Define Menu Overrides).

Define Menu Overrides

Instructions

All overriding values are optional. Where desired, assign an overriding stylesheet and images for a restyled version of the Menu pagelet. Default values will apply where no overrides are assigned.

Menu Navigation ID: PAPPBR_MENU4_PT_SWAN

Description:

Style Sheet

When this Menu is specified in a Theme, this overriding style sheet will apply to the Menu instead of the one assigned in the Theme.

Style Sheet Name:

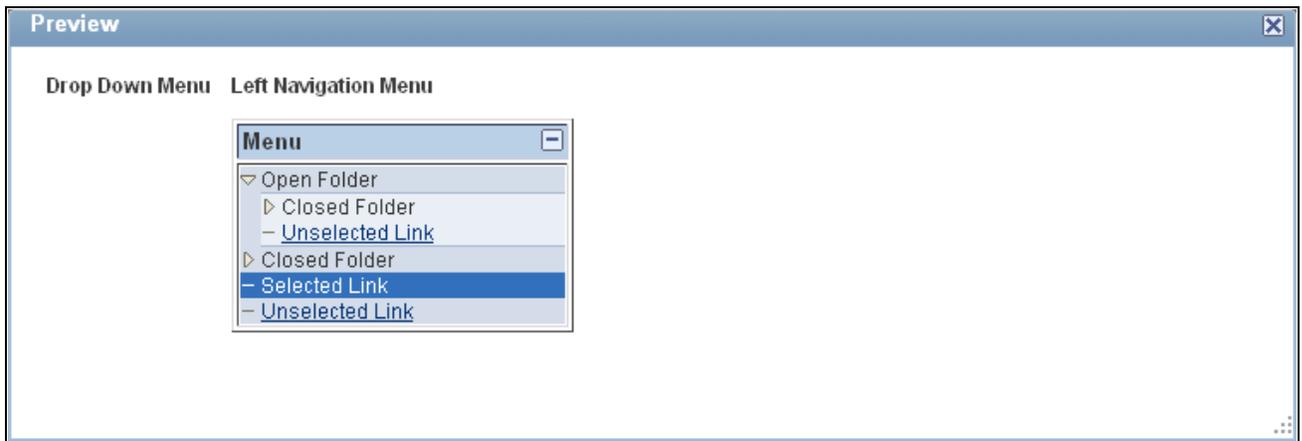
Left Navigation Menu Images

These image overrides are only used for the left navigation. If only the drop down navigation is used, there is no need to override these.

Maximize Icon:

Minimize Icon:

Define Menu Overrides page



Define Menu Overrides page: Instructions and Preview section

You can preview and test menu overrides using the Refresh button in the Instructions and Preview group box of the Define Menu Overrides page.

To preview menu pagelet overrides:

1. On the Instructions and Preview section, click the arrow to expand the section.

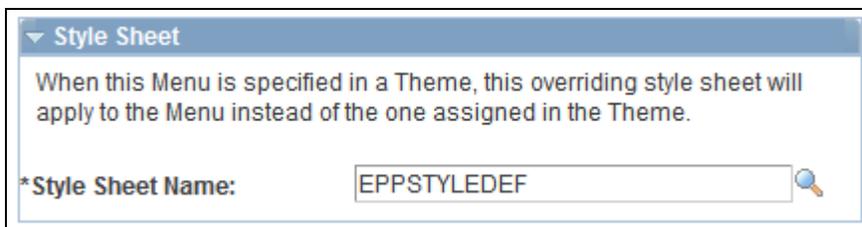
A sample menu pagelet displays that features all of the defined attributes on the Define Menu Overrides page. When no overrides are specified, the pagelet displays the default values.

2. Change or enter overriding values in the other sections on the page.
3. Click the Refresh button. The new overrides are reflected in the preview section.
4. To retain the selections, click the Save button.

Defining Menu Style Sheet Overrides

Use the Style Sheet section of the Define Menu Overrides page to specify the style sheet for the menu overrides. The style classes you subsequently specify on the Define Menu Overrides page must be defined within the designated style sheet, or at least within its cascading hierarchy. The style sheet that you specify takes precedence for menu styling over the style sheet identified in any theme to which this menu is a part.

Note. If you prefer not to use style sheets that reside in the PeopleSoft database, you can implement style sheets as you would do with regular HTML documents. You can either embed all the style declarations or link external style sheets inside the Head container tags in the HTML layout object.

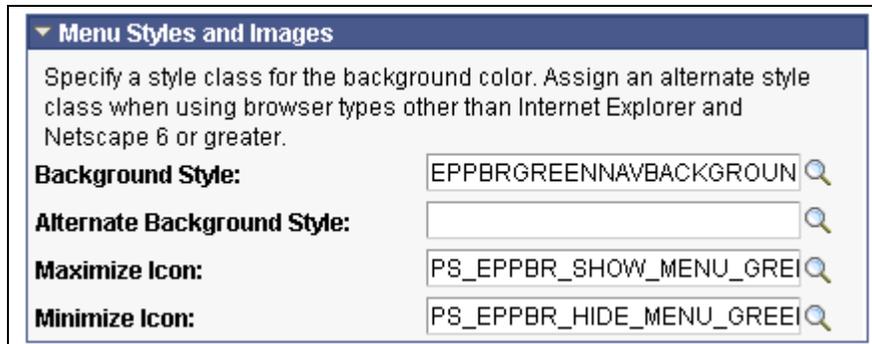


Define Menu Overrides page: Style Sheet section

- Style Sheet Name** Click the Lookup button to choose a style class, or manually enter one.
- Alternate Style Sheet** For browser types other than Microsoft Internet Explorer and Netscape Navigator 6.0, use the Lookup button to choose a style class, or manually enter one.

Defining Background Style and Image Overrides

Use the Menu Styles and Images section of the Define Menu Overrides page to define an overriding style class for the menu background color and for menu minimize and maximize icons.



Define Menu Overrides page: Menu Styles and Images section

- Background Style** Click the Lookup button to choose an overriding menu background style class, or manually enter one.
- Alternate Background Style** For browsers other than Microsoft Internet Explorer, click the Lookup button to choose an overriding menu background style class, or manually enter one.
- Maximize Icon** Click the Browse Image Catalog button to select an overriding image for the maximize icon on the menu. When the user clicks this icon, the menu frame will show/restore itself.
- Minimize Icon** Click the Browse Image Catalog button to select an overriding image for the minimize icon on the menu. When the user clicks this icon, the menu frame will hide itself, therefore allowing for more information to appear in the target page area.

Selecting Folder Style and Image Overrides

Use the Folder Styles and Images section of the Define Menu Overrides page to define overriding folder styles for the navigation menu.

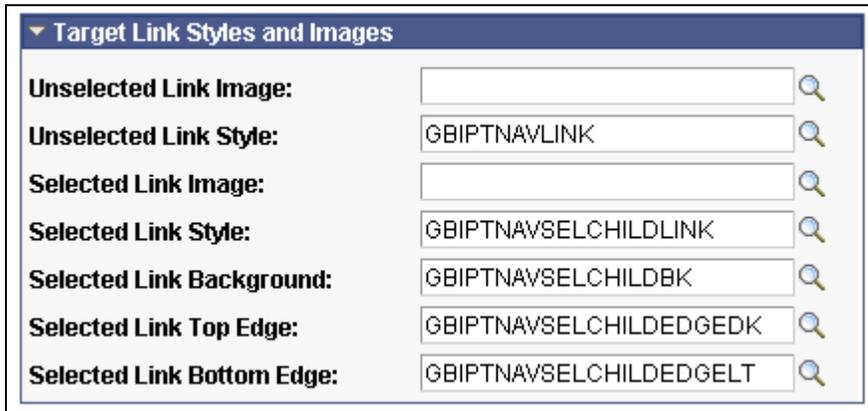
Folder Styles and Images	
Closed Folder Image:	PS_EPPBR_NAV_CLOSED_FLDF 
Folder Link Style:	EPPBRGREENNAVPARENTLINK 
Open Folder Image:	PS_EPPBR_NAV_OPEN_FLDR1_ 
Open Folder Background Style:	EPPBRGREENNAVSELPARENTB 
Edge:	EPPBRGREENNAVSELPARENTE 
Selected Folder Link Style:	EPPBRGREENNAVSELPARENTL 
Selected Folder Background:	EPPBRGREENNAVSELFOLDERE 

Define Menu Overrides: Folder Styles and Images section

Closed Folder Image	Click the Browse Image Catalog button to select an overriding image for the closed folder icon on the navigation menu.
Folder Link Style	Click the Lookup button to choose an overriding menu folder link style class, or manually enter one.
Open Folder Image	Click the Browse Image Catalog button to select an overriding image for the open folder icon on the navigation menu.
Open Folder Background Style	Click the Lookup button to choose an overriding menu background style class, or manually enter one.
Edge	Click the Lookup button to specify the dividing line between an open folder and a closed one.
Selected Folder Link Style	Click the Lookup button to choose an overriding folder link style class, or manually enter one for the folder you have currently selected.
Selected Folder Background	Click the Lookup button to choose an overriding folder background, or manually enter one for the folder background you have currently selected.

Defining Target Link Style and Image Overrides

Use the Target Link Styles and Images section of the Define Menu Overrides page to define overriding target link styles and target link image styles for the navigation menu.



Define Menu Overrides page: Target Link Styles and Images section

- Unselected Link Image** Click the Browse Image Catalog button to select an overriding image for links that are not selected on the navigation menu.

- Unselected Link Style** Click the Lookup button to choose an overriding style class for links that are not selected on the navigation menu.

- Selected Link Image** Click the Browse Image Catalog button to select an overriding image for selected links on the navigation menu.

- Selected Link Style** Click the Lookup button to choose an overriding style class for selected links on the navigation menu, or manually enter one.

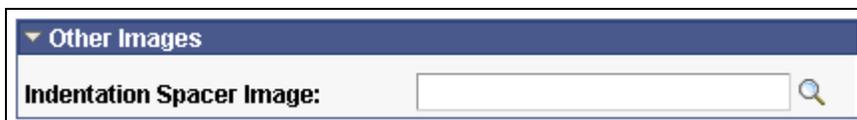
- Selected Link Background** Click the Lookup button to choose a background for a selected link.

- Selected Link Top Edge** Click the Lookup button to choose an overriding image for the border around the top edge of the highlighted links background color.

- Selected Link Bottom Edge** Click the Lookup button to choose an overriding image for the border around the bottom edge of the highlighted links background color.

Defining Other Image Overrides

Use the Other Images section of the Define Menu Overrides page to define other overriding images for the navigation menu.



Define Menu Overrides page: Other Images section

Indentation Spacer Image

Click the Browse Image Catalog button to select an overriding image for indentation spacers on the navigation menu.

You can control the size of the indentation for folders to subfolders to links by selecting a spacer image with of a size with more pixels or fewer pixels.

Assembling Branding Themes

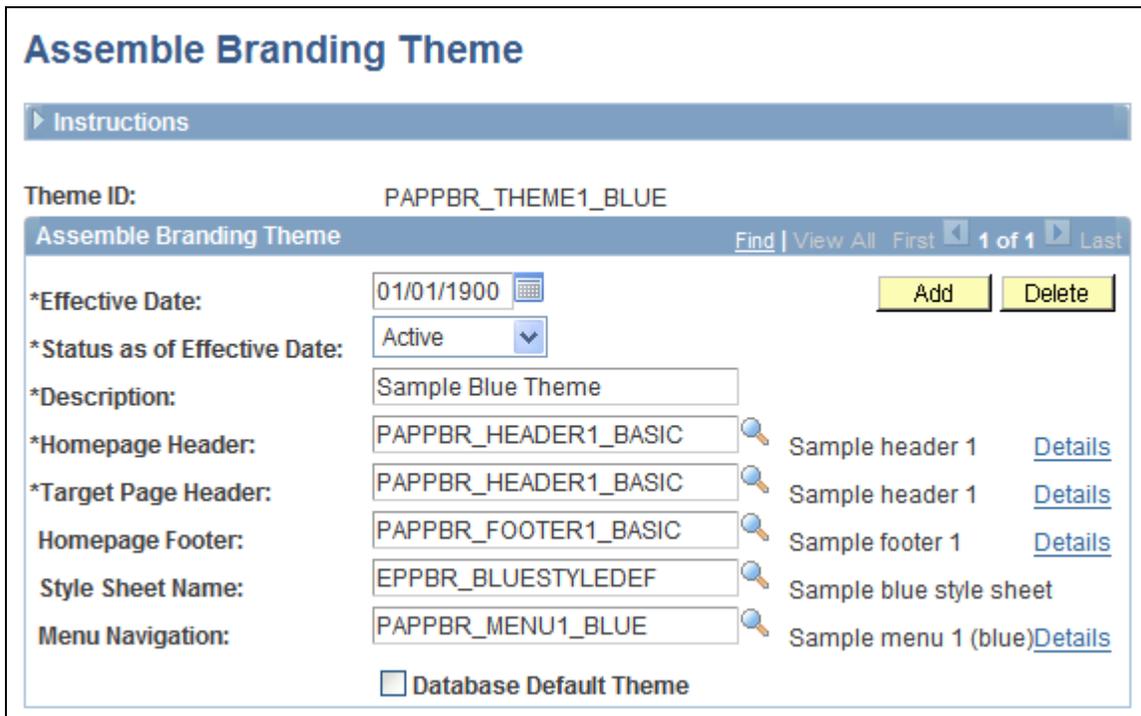
This section lists pages used and discusses how to assemble themes.

Page Used to Assemble Themes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assemble Branding Theme	EPPBR_THEME	Portal Administration, Branding, Assemble Themes, Assemble Branding Theme.	Select the headers, footer and menu elements for a theme, as well as the style sheet to apply.

Assembling Themes

Access the Assemble Branding Theme page (Portal Administration, Branding, Assemble Themes, Assemble Branding Theme).



Assemble Branding Theme page

After you have completed configuring the header, footer, and navigation menu, assemble the theme. When you assemble a theme you select the effective date of the theme. You also select the headers, footer and menu elements to use, and the style sheet to apply.

The choices of header and footers are filtered based on effective dates. For example, if you are working with a theme with an effective date of 01/01/2003, you cannot select a header or footer with an effective date of 02/01/2003.



Click the arrow to display instructions for using the page.

Theme ID

Object name of the branding theme.

Effective Date

Date that the theme takes effect.

Add

Click the button to add another effective dated version of the theme.

Delete

Click the button to delete the current effective dated version of the theme.

Status as of Effective Date

The valid choices are:

- *Active*. Activate the branding theme on the effective date.
- *Inactive*. Deactivate the branding theme on the effective date.

Description

Description of the branding theme.

Homepage Header

Header that applies to homepage tabs. Enter the header name in the field, or use the Lookup button to select one.

Target Page Header	Header that applies to the target or transaction PeopleSoft Pure Internet Architecture page. Enter the header name in the field, or use the Lookup button to select one.
Homepage Footer	Footer to apply to the homepage tabs. Enter the footer name in the field, or use the Lookup button to select one. If none is entered, there will be no footer on the homepage.
Style Sheet Name	Style sheet to apply to the branding theme. Enter the style sheet name in the field, or use the Lookup button to select one. If none is specified the portal database default style sheet from the PeopleTools Options page applies.
Menu Navigation	<p>Menu style to apply to the homepage. Enter the name of the menu style in the field, or use the Lookup button to select one. If none is specified the PeopleTools basic menu style applies.</p> <p>You can preview this style using the Define Menu Overrides page. Leave all of the override values blank.</p>
Database Default Theme	Select the checkbox to indicate that the theme displayed in the Theme ID field is the database default theme as of the effective date indicated. This theme will only apply if PeopleSoft Enterprise Portal branding is enabled (it is by default) and there is no portal site default theme assigned for an active portal registry.
Details	<p>Click the Details link to view or modify details relevant to the following branding components:</p> <ul style="list-style-type: none"> • <i>Homepage Header.</i> Displays the Define Header page for the specified Header ID. Use the page to view or modify header details, such as the effective date, images and image details, bar information, HTML areas, and special elements. • <i>Target Page Header.</i> Displays the Define Header page for the specified Header ID. Use the page to view or modify header details, such as the effective date, images and image details, bar information and HTML areas, and special elements. • <i>Homepage Footer.</i> Displays the Define Footer page for the selected Footer ID for the homepage footer. Use the page to view or modify footer details, such as the effective date, images and image details, bar information, and HTML areas. • <i>Menu Navigation.</i> Displays the Define Menu Overrides page for the specified Menu ID. Use the page to view or modify menu override details, such as the style sheet, styles, images and more. <p>See Chapter 7, "Configuring and Assembling Branding Themes," Selecting Headers and Footers, page 64.</p> <p>See Chapter 7, "Configuring and Assembling Branding Themes," Defining Overrides for Menu Styles, page 101.</p>

Chapter 8

Previewing, Selecting and Assigning Branding Themes, Components, Images, and Style Sheets

This chapter describes Oracle's PeopleSoft branding themes, components, images and style sheets and discusses how to:

- Preview delivered-branding themes.
- Preview delivered-branding theme components.
- Identify images, style sheets, and HTML objects.
- Assign branding themes to roles.

Previewing Delivered Branding Themes

This section discusses how to preview delivered branding themes.

Previewing Delivered Branding Themes

To view an entire branding homepage within the application pages, use the Assign Branding Themes page to assign a theme to a user role and then login to the system using that role. Note that all users with the role assignment will see the change. You may want to create a special user role, or use one that few people use.

Select Portal Administration, Branding, Assign Themes to access the Assign Branding Themes page (EPPBR_THM_ASSIGN).

To preview a branding theme:

1. Access the Assign Branding Themes page.
2. Click the Correct History button.
3. In the Role Name column, locate a user role.
4. Change the Theme ID for that user role to a Theme ID that you want to view.
5. Click the Save button.
6. Log out and then login to the system.

7. If any component has not changed or refreshed to the new theme assignment, right-click in the area and select Refresh.

Previewing Delivered Branding Theme Components

This section describes how to preview components of delivered branding themes.

Pages Used to Preview Components of Delivered Branding Themes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assemble Branding Themes	EPPBR_THEME	Portal Administration, Branding, Assemble Branding Themes	Use the Details link to view and preview details of theme components.

Previewing Components of Branding Themes

To preview delivered branding theme components:

1. Select Portal Administration, Branding, Assemble Branding Themes.
2. Select a Theme ID to preview from the list.

The Assemble Branding Themes page appears.

3. Click the Details hyperlink next to any of the following fields to open the definition page for each item.

To preview headers or footers, click the Preview button on the definition page . To preview a menu, view the image in the instructions section of the definition page.

4. After previewing a component, use the browser Back button to return to the Assemble Branding Themes page.

Identifying Images, Style Sheets, and HTML Objects

After you decide upon a theme to use, you must identify your company-specific images, style sheets, and HTML code for the theme. For example, you may want to incorporate a company logo into the theme using an image. You may also want to incorporate specific colors or a specific color scheme using a style sheet.

After you identify these images and style sheets, you also must determine how to call them for use by the theme.

You can load images, define style classes and create HTML as objects online in the branding pages or in the database by using Application Designer. The objects are then available to call from the "catalog" while you are defining headers and footers. Alternative options include, loading the images on a Web server and calling them using a URL, embedding style classes in your HTML design object or typing HTML code into the header or footer definition directly.

Assigning Branding Themes to Roles

This section provides an overview and discusses how to assign branding themes to roles.

Pages Used to Assign Branding Themes to Roles

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assign Branding Themes	EPPBR_THM_ASSIGN	Portal Administration, Branding, Assign Themes	Assign branding themes to roles.

Understanding Assigning Branding Themes to a Role

To provide a different portal branding experience to users, you can assign different branding themes to users based on each major role within the portal.

When you assign branding themes to roles you also assign a priority sequence number to each role. The priority number dictates each role's precedence in determining which theme will display for the user.

If a user has two or more roles with a branding theme assignment, the role with the higher priority applies, with 1 being the highest priority, 2 being the next highest priority, and so on. If a user has none of the theme-assigned roles, the Portal Default Theme applies.

The assignment list is effective-dated and the choices of themes are filtered based on that effective date. An assignment list with an effective date of 11/01/2002 will not be able to select themes with effective dates of 02/01/2003.

If you are using role-based branding, you should create a new theme assignment set with a new effective date when either of the follow occurs:

- There is a change to a theme assignment for a role.
- A new role is created that requires its own branding theme.

Optionally, your assignment setup can bypass role-based branding altogether by simply assigning a portal default theme. All users of that portal will see that one theme.

Assigning a Branding Theme to a Role

Access the Assign Branding Themes page (Portal Administration, Branding, Assign Themes).

Assign Branding Themes

▶ Instructions

Portal Name: EMPLOYEE

Assign Branding Themes Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 Add Delete

*Description: Employee Portal Branding

*Portal Default Theme ID: PAPPBR_THEME_PT_SWAN Tools Swan Theme Details

Assign Themes to Roles Find View All First 1-10 of 10 Last					
*Priority #	*Theme ID	Details	*Role Name		
	PAPPBR_THEME_PT_SWAN	Details	PAPP_SYSTEM_ADMIN	Add	Delete
4	PAPPBR_THEME3_JEONLY_CURVED	Details	PAPP_BRANDING_ADMIN	Add	Delete
6	PAPPBR_THEME3_JEONLY_CURVED	Details	PAPP_DISPLAY_ADMIN	Add	Delete
8	PAPPBR_THEME2_GBI	Details	PAPP_CONTENT_ADMIN	Add	Delete
10	PAPPBR_THEME4_TOOLS	Details	PAPP_PORTAL_ADMIN	Add	Delete
12	PAPPBR_THEME1S_BLUE	Details	PAPP_EMPLOYEE	Add	Delete
15	PAPPBR_THEME1_BLUE	Details	PAPP_SUPPLIER	Add	Delete
20	PAPPBR_THEME1_GREEN	Details	PAPP_CUSTOMER	Add	Delete
50	PAPPBR_THEME5_TOOLSCLASSIC	Details	PAPP_USER	Add	Delete
200	PAPPBR_THEME5G_TOOLSCLASSIC	Details	PAPP_GUEST	Add	Delete

Assign Branding Themes page

You work with the following fields and controls while working with the Assign Branding Theme page:

- Instructions** Click the arrow to display instructions for using the page.
- Portal Name** Name of the current portal. This is the portal site to which the assignments apply.
- Effective Date** The date the branding theme assignments take effect.
- Add** Two Add buttons appear on the Assign Branding Themes page:
 - Click the Add button next to the Effective Date field to add a new effective-dated theme assignment to the portal.
 - Click the Add button in the Assign Themes to Roles section to add individual role or theme assignments.

Delete	Two Delete buttons appear on the Assign Branding Themes page: <ul style="list-style-type: none">• Click the Delete button next to the Effective Date field to delete the current effective-dated theme assignment for the portal.• Click the Delete button in the Assign Themes to Roles section to delete individual role or theme assignments.
Portal Default Theme ID	Displays the name of the default theme.
Priority # (number)	Enter a priority sequence number for each role. The priority number dictates each role's precedence in determining which theme will display for the user. <p>If a user has two or more roles with a branding theme assignment, the role with the higher priority applies, with <i>1</i> being the highest priority, <i>2</i> being the next highest priority, and so on. If a user has none of the theme-assigned roles, the Portal Default Theme applies.</p>
Theme ID	Object name of the branding theme.
Details	Several Details links appear on the Assign Branding Themes page: <ul style="list-style-type: none">• Click the Details link next to the Portal Default Theme ID field to view or modify details for the default theme. When you click the link, the Assemble Branding Theme page displays and you can view or modify information about the theme components.• In the Assign Themes to Roles section, click the Details link for any theme ID to view or modify details for the theme assigned to the specified role. When you click the link, the Assemble Branding Theme page displays and you can view or modify information about the theme components.
Role Name	Select the role that the theme applies to.

Chapter 9

Developing Custom Branding Themes

This chapter provides an overview of custom branding theme development and provides examples that demonstrate how to:

- Create and configure custom branding headers.
- Use branding and portal registry attributes to create custom homepages.

Understanding Developing Custom Branding Themes

This section provides overviews and discusses the:

- Development process for custom branding themes.
- Custom branding development considerations.

Development Process Overview for Custom Branding Themes

The process for creating custom branding themes is as follows :

1. In Application Designer, create an HTML object for branding component.
2. Identify syntax in your custom HTML that can be replaced branding system elements.
3. Replace identified HTML Syntax with bind variables.
4. Configure the component (header, footer, menu and so forth).
5. Assemble the components into a theme.
6. Assign the theme.
7. Deploy the theme to production.

Assembling theme components, assigning themes and deploying themes to production are discussed elsewhere in this PeopleBook.

See Understanding Enterprise Portal Branding

See [Chapter 7, "Configuring and Assembling Branding Themes," Assembling Branding Themes, page 107;](#) [Chapter 8, "Previewing, Selecting and Assigning Branding Themes, Components, Images, and Style Sheets," page 111](#) and [Chapter 11, "Deploying Branding Themes," page 135.](#)

Custom Branding Development Considerations

This section discusses items to consider when you are developing branding themes.

Attributes and Styles

Once you have an HTML layout ready with the predefined system elements in place, the actual configuration of headers and footers is quite straightforward—you set the actual values for images, HTML, links, and so forth in the header and footer components.

To refine your header or footer through the configuration, set the attribute and style class fields on the header and footer pages. This will give you greater flexibility to manipulate the look and feel using table data without changing database HTML objects.

The following table illustrates how data entered on the header and footer definition pages and stored in the attribute and style class fields is applied when generating the final header and footer HTML. For example, if you set the Image Attribute field value for the Image system element to `valign="top"`, the HTML placement value will be ``.

The list of HTML objects used in the process is for reference only. You should be able to achieve your desired look and feel by changing the style classes and the layout HTML object.

Note. Do not change the listed HTML objects. Any changes will be customizations and will impact future upgrades.

<i>Element Type</i>	<i>Element</i>	<i>Field</i>	<i>HTML Placement</i>	<i>HTML Object/Note</i>
Image	Image	Image Attribute	<code></code>	<ul style="list-style-type: none"> HTML.EPPBR_IMGhref_HTML HTML.EPPBR_IMGONLY_HTML
Bar	Bar	Style Class	<code><tr class=xxx></code>	<ul style="list-style-type: none"> HTML.EPPBR_TABLE_OPEN TAG HTML.EPPBR_TABLE_OPEN TAGNOSTYLE
Bar	Bar-Divider	Image Attributes	<code><td> </td></code>	NA
Bar	Bar-Item	Style Class	<code><td class=XXX> </code>	<ul style="list-style-type: none"> HTML.EPPBR_TABLE_OPEN TAG HTML.EPPBR_TABLE_OPEN TAGNEXT
Bar	Bar-Item Icon	Image Attributes	<code></code>	EPPBR_IMGsrc_HTML

Element Type	Element	Field	HTML Placement	HTML Object/Note
My Links	My Links	Style Class	<td class=XXX><select class="EPPBRSHORTCUT SELECT"><option class="EPPBRSHORTCUT COLLECTION">	For additional options within the My Links dropdown list box, add the following styles to your style sheet and make modifications, if necessary. <ul style="list-style-type: none"> EPPBRSHORTCUTSELECT EPPBRSHORTCUTCOLLECTION
Search	Search Options	Item Attribute	<table xxx>	HTML.EPPBR_SRCH_HTML
Search	Search Options - Text Entry Box	Style Class	<input class=XXX>	NA
Search	Search Options - Search Icon	Image Attributes		<ul style="list-style-type: none"> HTML.EPPBR_GOBTN_SAVE WARN HTML.EPPBR_GOBTN_NOSA VEWARN HTML.EPPBR_IMGhref_HTML HTML.EPPBR_IMGONLY_HTML
Homepage Help	Homepage Help	Style Class and Item Attributes		HTML.EPPBR_HDR_HELP
Homepage Tab	Homepage Tab	Style Class and Item Attributes	<table class=XXX XXX>	HTML.EPPBR_TAB_OPENTAG
Homepage Tab	Homepage Tab - Active/Inactive Tab Style	Style Class	<td class=XXX> 	HTML.EPPBR_HP_INACTIVE_TAB
Homepage Tab	Homepage Tab - Transitional Images	Image Attributes	<td XXX> 	NA
Homepage Tab	Homepage Tab - Top/Bottom Images	Image Attributes	<td XXX> 	NA

Stylesheets

The user homepage usually includes a header, footer, menu navigation pagelet, and a few homepage pagelets. There are several stylesheet references when the homepage is generated. They are applied in the following sequence:

1. Stylesheet specified for the homepage pagelets, if any of the displaying homepage pagelets is an iPage. This is set in the page properties in Application Designer.
2. Stylesheet defined in the Define Menu Styles component, if the Enterprise Menu pagelet is on the homepage.
3. Stylesheet defined for the PeopleTools standard header.
4. Stylesheet defined in the theme definition.

You can have conflicting style classes within all of these stylesheets used in the template. For example, if you have a style class named `MY_STYLE_CLASS` in the first stylesheet and also have a style class named `MY_STYLE_CLASS` in the fourth stylesheet, there may be conflicting styles in the resulting homepage. Because the conflicting styles are defined at the same level, the one applied later in the sequence takes precedence.

In the homepage template, the stylesheet specified in the branding theme definition always takes precedence over competing stylesheets. For example, `PSPAGE` in the stylesheet `EPPSTYLEDEF` includes two pixels for the left margin. To override the left margin, `PSPAGE` is included in the blue theme stylesheet `EPPBRBLUESTYLEDEF`, but the left margin has been changed to zero.

You can also have conflicting styles in your target content template. In a page-based template, the stylesheet associated with the page used for the target content always takes precedence over competing stylesheets. In a frame-based template, the stylesheet specified in each frame takes precedence for the content within the frame.

In addition to the specifics mentioned here, all the rules of inheritance and conflicting styles of cascading stylesheets still apply. Keep your custom stylesheet definition as clean as possible and include only the style classes needed to avoid style conflicts.

Menu Navigation

PeopleSoft Enterprise Portal has its own version of enterprise menu navigation. The menu styles provided by branding apply to the Enterprise Menu pagelet only. You can change the look and feel of the menu navigation by specifying images and styles. While the following three style classes are also used by the menu, they are not configurable through the same mechanism:

`PTPAGELET`—Style class for the pagelet.

`PTPAGELETHEADER`—Style class for the pagelet header.

`PTPAGELETBODY`—Style class for the pagelet body.

These style classes are hard-coded for all homepage pagelets that include the Enterprise Menu pagelet in the left navigation. To vary the pagelet styles by branding theme, add the style classes with different style properties to the stylesheet included in the theme definition. Another option is to add the style classes to the stylesheet included in the menu style definition, and whichever theme uses the menu style will have the new styles.

Homepage Hyperlink Colors

To control the hyperlink colors on homepage pagelets, the PSHYPERLINK style class must be in the stylesheet. You will modify this styleclass to change hyperlink colors. Remember to modify the pseudo-classes listed on the property pages for PSHYPERLINK.

You should also specify default font attributes for the <A> and <TD> tags in your own external stylesheet or an embedded stylesheet at the top of a layout HTML object. This provides font attributes for text if you don't set style classes for certain elements. For example:

```
<STYLE TYPE="text/css"> td { font-family:arial; font-size:9pt; } a:visited { font-family:arial; font-size:9pt; color: #5c93ae; text-decoration: underline } a:link { font-family:arial; font-size:9pt; color: #5c93ae; text-decoration: underline } a:hover { font-family:arial; font-size:9pt; color: #5c93ae; text-decoration: underline } a:active { font-family:arial; font-size:9pt; color: #5c93ae; text-decoration: underline } </STYLE>
```

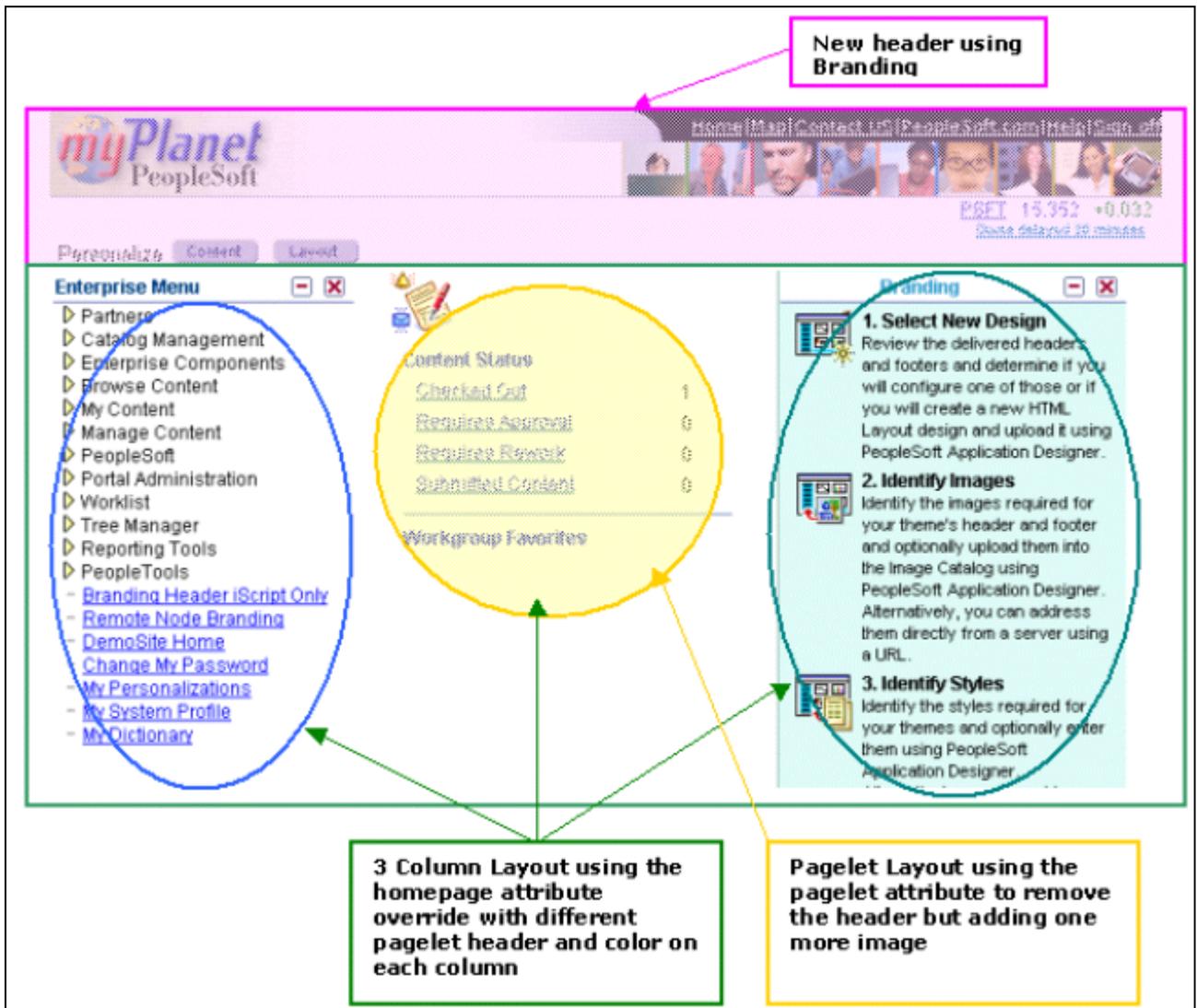
Example: Using Branding and Portal Registry Attributes to Create Custom Homepages

This section provides an overview and example for using branding and portal registry attributes to create custom homepages, and discusses how to:

- Override the three-column layout.
- Override the pagelet layout.

Understanding Using Branding and Portal Registry Attributes

The following homepage was created using PeopleSoft Enterprise Portal branding and portal registry attributes.



Example homepage

The homepage includes the following elements:

- Branding header created using theme assignment.
- Branding menu navigation body created using theme assignment.
- Pagelets of different colors in different columns created by overriding the HTML PORTAL_HP_3COL_LAYOUT three-column layout.
- Different pagelet layout for the Workgroup Content pagelet created by overriding the HTML PORTAL_HP_COMPONENT pagelet.

Overriding the Three-Column Layout

Access the Content Reference Attributes section of the Content Ref Administration page. Select PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs. Then, select the page where the overrides will apply.

The screenshot shows the 'Content Ref Administration' page with the following details:

- Navigation:** Root > Portal Objects > Homepage > Tabs >
- General Tab:**
 - Name: DEFAULT
 - Author: PTDMO
 - Parent Folder: Tabs
 - *Label: My Page (with 'Copy object' and 'Select New Parent Folder' buttons)
 - Long Description: Default system tab (254 Characters)
 - Product: PT
 - Sequence number: [empty]
 - Object Owner ID: PPT (with search icon and 'PeopleTools' text)
 - Usage Type: Homepage tab (dropdown)
 - Storage Type: Local (in HTML Catalog) (dropdown)
 - *Valid from date: 01/01/1900 (calendar icon)
 - Valid to date: [empty] (calendar icon)
 - Creation Date: 03/11/2001
- Homepage tab attributes:**
 - Allow rename
 - Help ID: [empty]
 - Hide pagelet action bar
- Content Reference Attributes:**
 - Name: [empty] (with 'Delete' button)
 - Label: [empty]
 - Attribute value: [empty]
 - Translate
 - [Attribute Information](#)
 -

Content Ref Administration page showing Content Reference Attributes section

Override the three-column layout by entering an attribute value of `PORTAL_HP_3COL_LAYOUT_NEW`. Ensure that the Translate option is clear.

For the example in this section, in the new `HTML.PORTAL_HP_3COL_LAYOUT_NEW` layout, column three (`PLANET_COL3`) is set to use a background color to differentiate it from the first and second columns.

You can also vary pagelet header style by column. In this example, assuming the `PORTAL_HP_COMPONENT` is the HTML object used for all pagelets and that `PTPAGELETHEADER` style class is used as the pagelet header, you can use ID and DIV tags within each column to vary the column header styles.

The following is the content of the new `PORTAL_HP_3COL_LAYOUT_NEW`, which we use to override the default `PORTAL_HP_3COL_LAYOUT`. The code in bold illustrates the way in which you can use different colors in different columns.

```

<style type="text/css">
#COL1 TD.PTPAGELETHEADER { background-color: white; text-align: left}
#COL2 TD.PTPAGELETHEADER { background-color: white; text-align: left}
#COL3 TD.PTPAGELETHEADER { background-color: white; text-align: center; color:⇒
#3399cc}
</style>

<table width="100%">
  <tr>
    <td width="28%" valign="top" class="PLANET_COL1">
      <div id="COL1">
        %BIND(:1)
      </div>
    </td>
    <td width="6">
    </td>
    <td width="32%" valign="top" class="PLANET_COL2">
      <div id="COL2">
        %BIND(:2)
      </div>
    </td>
    <td width="6">
    </td>
    <td width="32%" valign="top" class="PLANET_COL3">
      <div id="COL3">
        %BIND(:3)
      </div>
    </td>
    </td>
    <td width="6">
    </td>
  </tr>
</table>

```

Overriding the Pagelet Layout

If you want to override the layout of only the Workgroup Content pagelet in the second column of the homepage, you do so by setting the non-translatable attribute (clearing the Translate option) on the content reference for the pagelet itself.

You can also vary pagelet header style by column. In this example, assuming the PORTAL_HP_COMPONENT is the HTML object used for all pagelets and that PTPAGELETHEADER style class is used as the pagelet header, you can use ID and DIV tags within each column to vary the column header styles.

Note. If you want to override the HTML object used by the pagelet, you are not required to use PTPAGELETHEADER

Content Reference Attributes	
Name:	<input type="text" value="PORTAL_HP_COMPONENT"/> <input type="button" value="Delete"/>
Label:	<input type="text"/> <input type="checkbox"/> Translate
Attribute value:	<input type="text" value="PORTAL_HP_COMPONENT_CM"/>
<input type="button" value="Add"/>	

Overriding the pagelet layout

HTML.PTPPB_HP_COMP_NOHEAD is the custom HTML object to use to override the default HTML used in PORTAL_HP_COMPONENT for the Workgroup Content pagelet.

In the Content Workgroup pagelet HTML object HTML.PTPPB_HP_COMP_NOHEAD, remove the pagelet header and add an additional image using %BIND12. Define the image value on the Content Reference Attributes section of the Content Ref Administration page for IMAGE_BIND_12.

Content Reference Attributes	
Name:	<input type="text" value="IMAGE_BIND_12"/> <input type="button" value="Delete"/>
Label:	<input type="text"/> <input type="checkbox"/> Translate
Attribute value:	<input type="text" value="EOCM_DEFINE_NOTIFICATION_ICN"/>
<input type="button" value="Add"/>	

Overriding the pagelet layout

The following example shows the HTML object code for the Content Workgroup pagelet. The code in bold illustrates the modifications made to the HTML described in this section.

```

<!-- Begin Pagelet=%bind(:5) -->
<!-- PageletState=MAX -->
<li id="ptpgltli_%bind(:5)" class="pthpli %bind(:6)">
<table id="%bind(:5)" class="PTPAGELET" width="100%" cellpadding="0" cellspacing=>
"0" border="1" summary="">
  <tr style="display:none;">
    <td>
      %bind(:2)
    </td>
  </tr>
  <tr>
    <TD CLASS="PLANETICONHEADER">
      <!--image 12-->
      <IMG SRC="%BIND(:12)" NAME="workgroup" border="0">
    </TD>
  </tr>
  <tr id="ptpgltbody_row_%BIND(:5)">
    <td id="ptpgltbody_%bind(:5)" class="PTPAGELETBODY" width="100%">
      <Pagelet Name="%bind(:2)">
        <Source Pagelet="%bind(:4)" href="%bind(:3)" />
      </Pagelet>
    </td>
  </tr>
</table>
</li>
<!-- End Pagelet=%bind(:5) -->

```

Chapter 10

Understanding Branding Theme Development and Deployment

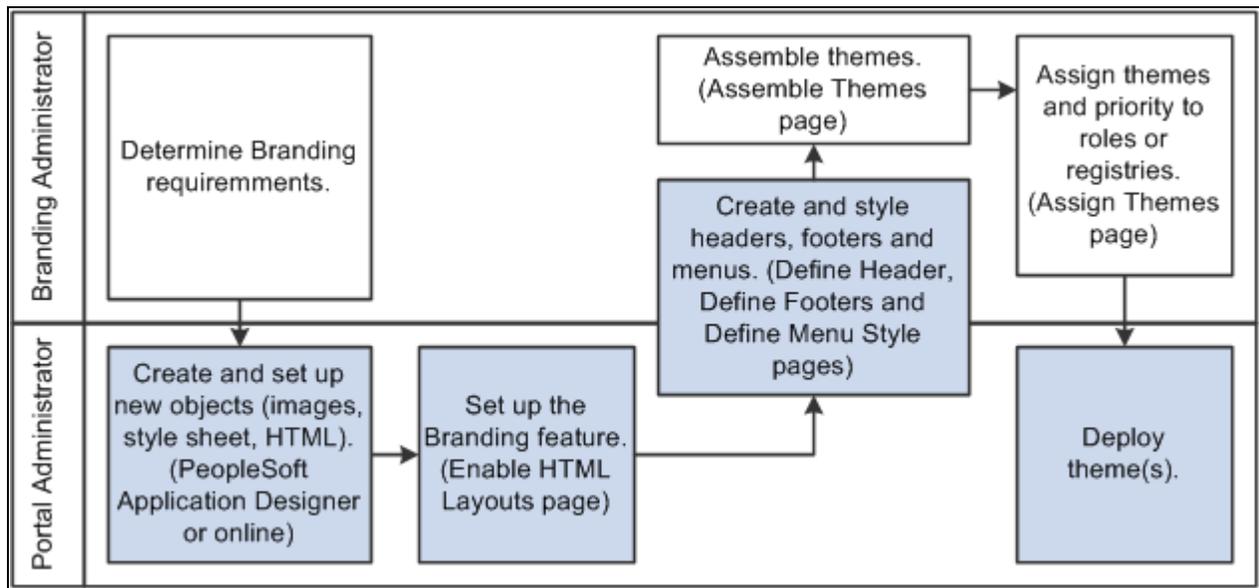
This chapter provides an overview of branding theme development and deployment and discusses how to:

- Determine the environment for branding theme development.
- Use effective dating to create branding theme versions.
- Use default branding themes and branding theme hierarchy.

Understanding the Branding Theme Development Process Flow

This section discusses how to:

- Determine branding requirements.
- Create and setting up new objects.
- Set up the branding feature.
- Create and styling headers, footers, and menus.
- Assemble branding themes.
- Assign roles to themes and creating role precedence lists.
- Deploy roles and theme assignments.



Branding development process flow

Determining Branding Requirements

To determine the branding requirements of your organization, you most likely will work with a branding administrator, a communications manager, or someone in a similar role, to determine the look and feel that you want to produce on the portal.

The next step is to preview the delivered branding themes and determine one or more themes to implement that match your business requirements.

After you identify these themes, you can determine any custom images (such as your company logo), styles, color schemes, and so on that need to be included in the theme(s).

You then provide these styles and images to the portal administrator, so that he or she can transform the design components into objects that you can use with PeopleSoft Enterprise Portal branding.

Creating and Setting Up New Objects

Using the images and color schemes identified as branding requirements, the portal administrator creates new objects using Application Designer or can upload them using the branding pages.

Objects that you might want to upload or modify typically include:

- Image objects. Images utilized by the HTML layouts of the header, footer and menu pagelets.
- Style sheet objects. Style sheets for borders, fonts, and colors.
- Snippets of HTML. Used for adding free-form HTML and other objects, such as dynamic information, to a layout at predefined HTML-configurable positions.
- HTML objects. HTML for the header and footer. (If you create your own HTML layouts from scratch.)

Setting Up the Branding Feature

Oracle delivers the PeopleSoft Enterprise Portal branding feature enabled.

Note. If you disable the PeopleSoft Enterprise Portal branding feature, the system reverts to the standard PeopleTools branding functionality, where there is little flexibility for configuration and dynamic changes.

Therefore, the only steps the portal administrator needs to perform to set up the branding feature are:

- View the system elements to review and specify elements that sites can override.
- Enable the HTML layouts.

Creating and Styling Headers, Footers, and Menus

You must configure the components and elements that you will use in themes, such as headers, footers, style sheets and menus, including the images and links that you will use on these items.

Note. The delivered headers, footers and menus consist of system data. During the upgrade process new system data will overwrite existing system data. Therefore, to support software upgrades, use the Copy Header and Copy Footer features to create headers and footers with unique header and footer names. In the case of menus, create new ones.

The PeopleSoft Enterprise Portal branding application pages allow you to:

- Assign and refine images.
- Construct links.
- Modify delivered headers, footers and so on.
- Copy an existing header or footer to use as a starting point for your configuration.
- Create versioned (effective-dated) headers and footers.
- Select the bar elements to display and use in headers, such as Home, Worklist, Add to My Links, and Signout.
- Configure the special elements, like Search options, My Links, homepage Help and homepage tabs.

Assembling Branding Themes

After you configure components and elements, you assemble them into a theme or themes.

Assigning Roles to Themes and Creating Role Precedence Lists

After you define themes, you can create the hierarchy of when specific themes are to appear to different registries or users.

There is a default theme for each of the portal registries and the database as a whole, and you can optionally assign themes to user roles and set the theme priorities. All the theme assignments are effective dated.

If no theme assignments exists, the branding defaults to the database default theme. If no theme is designated as the database default, the branding will fall back to the PeopleTools-delivered look.

See [Chapter 10, "Understanding Branding Theme Development and Deployment," Using Default Branding Themes and Branding Theme Hierarchy, page 132.](#)

Deploying Role and Theme Assignments

After you customize branding themes you must deploy the role and theme assignments. The steps to accomplish this task vary, depending on the environment (development or production) that you use to develop the themes.

See [Chapter 11, "Deploying Branding Themes," page 135.](#)

Determining the Environment for Branding Theme Development

This section provides an overview and discusses:

- Developing in production environments.
- Developing in development environments.

Understanding the Development Environment

When you customize and test branding themes, you personalize, style, and preview headers and footers, as well as restyle menus.

This approach allows you to view and make iterative changes to your work-in-progress. You can perform these actions in the production environment, or in a separate development environment where you migrate all objects and data to the production environment after development and testing are complete.

Choice of Environment	Description/Considerations
Production environment.	You develop and test branding themes in the production environment.
Development environment.	You develop and test branding themes outside of the production environment. When the development and testing are complete, migrate all required metadata and objects to the production environment using standard PeopleTools utilities, such as Application Designer Upgrade Copy and PeopleSoft Data Mover scripts.

Developing in Production Environments

This section highlights the steps and activities for developing themes in the production environment.

Step	Activities
Development and testing.	<ol style="list-style-type: none"> 1. In the main portal, define headers, footers and menu styles, and then assemble the theme(s). <p>Note. Define images and styles using remote URLs if you do not want to upload them to the database yet.</p> <ol style="list-style-type: none"> 2. Assign the new theme(s) to roles.
Deployment.	See Chapter 11, "Deploying Branding Themes," page 135.

Developing in Development Environments

This section highlights the steps and activities for developing themes in a development environment.

Step	Activities
Initial set up.	Verify that the roles in the development environment are the same as those that exist in the production environment.
Development and testing.	Define headers, footers and menu styles, and then assemble the theme(s).
Deployment.	See Chapter 11, "Deploying Branding Themes," page 135.

Using Effective Dating to Create Branding Themes Versions

Effective dating allows you to store historical data, see changes in your data over time, and enter future data. For example, you may want to track several versions of a branding theme and when they were deployed—that is, made effective.

When you enter a modified version of a theme that is related to an existing design, you don't want to lose or overwrite the data already stored in the database. To retain history, you add a data row identified by the date when the information goes into effect—the effective date. You can use the different action type buttons to look at what has happened up to the currently effective version and plan for the future. The PeopleSoft system categorizes effective-dated rows into the following basic types:

- Current** The data row with the date closest to, but not greater than, the system date. Only one row can be the current row.
- History** Data rows that have effective dates earlier than the current data row.
- Future** Data rows that have effective dates later than the system date.

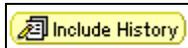
The action type that you select when on the page dictates whether you can update certain fields and what you can do with each type of row. The following action buttons are located in the toolbar at the bottom of each page on which they are applicable. A grayed out button indicates the page is currently in that mode.



Use this button to perform the following actions:

- View current and future versions.
- Edit or change future versions only.

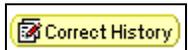
When adding new version rows, the effective date must be greater than or equal to the current row.



Use this button to perform the following actions:

- View history, current and future versions.
- Edit or change future versions only.

When adding new version rows, the effective date must be greater than or equal to the current row.



Use this button to perform the following actions:

- View history, current and future versions.
- Edit or change all existing rows.

When adding new version rows, there are no effective date restrictions.

Using Default Branding Themes and Branding Theme Hierarchy

Branding themes can be active at the PeopleTools, application database, portal site/registry, or role level. The current active theme is based on the following hierarchy:

1. *PeopleTools level.* The theme at this level is the hard-coded default.

See Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration , "Using PeopleTools Utilities", PeopleTools Options

2. *Database level.* If the system locates a database default theme as specified in the Assemble Themes page, it will apply that theme as the default, thereby overriding the PeopleTools default. Keep in mind that themes are effective dated, so you must identify the current effective-dated theme. Run the Database Default Theme query to discover the current effective-dated theme.

See [Chapter 7, "Configuring and Assembling Branding Themes," Assembling Branding Themes, page 107.](#)

See [Chapter 12, "Running Branding Queries," Running the Database Default Theme Query, page 143.](#)

3. *Portal site/registry level.* Themes specified at this level on the Assign Themes page, it take precedence over the PeopleTools hard-coded default theme and any theme designated at the database level. Run the Portal Site Default Theme query to discover the portal site default theme.

See [Chapter 8, "Previewing, Selecting and Assigning Branding Themes, Components, Images, and Style Sheets," Assigning Branding Themes to Roles, page 113.](#)

See [Chapter 12, "Running Branding Queries," Running the Portal Site Default Themes Query, page 144.](#)

4. *Roles level.* If themes are assigned at the role level for a portal site or registry, they take precedence over themes assigned at any other level.

Chapter 11

Deploying Branding Themes

This chapter discusses how to:

- Deploy branding themes from a production environment.
- Deploy branding themes from a development environments.

Deploying Branding Themes From a Production Environment

To deploy themes from a production environment:

1. Ensure that all images, styles, and HTML objects are in the production database. This may require entry through Application Designer, use of the Upgrade Copy process, migrating remote objects to production servers, or a combination of these tasks.
2. Assign the new themes to the portal and specific roles, as desired. You stage them to appear on the proper date by using the Effective Date field on the Assign Themes page.

See [Chapter 10, "Understanding Branding Theme Development and Deployment," Using Effective Dating to Create Branding Themes Versions, page 131.](#)

See [Chapter 8, "Previewing, Selecting and Assigning Branding Themes, Components, Images, and Style Sheets," Assigning Branding Themes to Roles, page 113.](#)

3. Test results and make adjustments as necessary.

Deploying Branding Themes From a Development Environment

This section provides an overview and discusses how to deploy branding themes from a development environment.

Understanding the PeopleSoft Data Mover Script Use in Branding Theme Deployment

Deploying branding themes from a development environment may require that you use PeopleSoft Data Mover scripts and the Upgrade Copy process. To use either, the same PeopleTools version must be running in both development and production environments.

Before you run a PeopleSoft Data Mover script, review the instructional text provided in each script.

The CLEAN script scrubs projects that you create in development environments, so that only branding-related objects are included. The other scripts come in pairs: an export version to pull the branding data out of development and an import version to push the data into production.

PeopleSoft Data Mover scripts for use in deploying branding themes fall into the following three categories:

- PeopleSoft Data Mover scripts that apply to all themes, but do not apply to site overrides.
- PeopleSoft Data Mover scripts that apply to selected themes, but do not apply to site overrides.
- PeopleSoft Data Mover scripts that apply to selected sites and apply to site overrides.

The following PeopleSoft Data Mover scripts apply to all themes, but do not apply to site overrides.

Script Name	Action	Definitional Data	Application Designer Objects
EPPBRALLCLEAN.DMS	Cleans the Application Designer project to include only branding objects, such as image, HTML, and style sheet objects.	No	Yes
EPPBRALLEXP.DMS	Extracts data from the source database and creates a .dat file.	Yes	No
EPPBRALLIMP.DMS	Loads the exported .dat file into the destination database.	Yes	No

The following PeopleSoft Data Mover scripts apply to selected themes and do not apply to site overrides.

Script Name	Action	Definitional Data	Application Designer Objects
EPPBRTHMCLEAN.DMS	Cleans the Application Designer project to include only branding objects, such as image, HTML, and style sheet objects.	No	Yes
EPPBRTHMEXP.DMS	Extracts data from the source database and creates a .dat file.	Yes	No
EPPBRTHMIMP.DMS	Loads the exported .dat file into the destination database.	Yes	No

The following PeopleSoft Data Mover scripts apply to selected sites and all overrides.

<i>Script Name</i>	<i>Action</i>	<i>Definitional Data</i>	<i>Application Designer Objects</i>
EPPSMBRCLEAN.DMS	Cleans the Application Designer project to include only branding objects, such as image, HTML, and style sheet objects.	No	Yes
EPPSMBREXP.DMS	Extracts data from the source database and creates a .dat file.	Yes	No
EPPSMBRIMP.DMS	Loads the exported .dat file into the destination database.	Yes	No

Deploying Branding Themes From a Development Environment

To deploy branding themes from a development environment:

1. Verify that all theme definitions have effective dates as required for production use.
2. Move branding-related objects to production.

There are two options for moving branding-related objects to production. For either method, you can use the branding queries to identify all objects related to headers, footers and menus.

In addition, for either option, preparing the objects for migration to production may require the use of the Upgrade Copy process, migrating remote objects to production servers, or both.

- Create an Application Designer project and insert related image, HTML, style sheet, and application package/class objects manually. Then, copy the project to the target database.
 - Create an Application Designer project and insert *all* image, HTML, style sheet objects and, if used in branding, the application package/class objects, and run CLEAN.dms to scrub the project.
3. Run the PeopleSoft Data Mover scripts to move the data comprising the theme, header, footer and menu override definitions.
 4. Run the Copy Upgrade process to move branding objects.

Prior to executing the Copy Upgrade process, you may want to rerun the branding queries to double-check that you have identified all objects required for headers, footers and menus. Compare the list to the objects in the project after running the CLEAN PeopleSoft Data Mover script.

5. Check the results and make adjustments as necessary.

Chapter 12

Running Branding Queries

This chapter provides an overview and lists common elements for use in branding queries and discusses how to:

- Run the Theme Definition query.
- Run the Database Default Theme query.
- Run the Portal Site Default Themes query.
- Run the Themes Assigned to Roles query.
- Run the Header/Footer Objects and Details query.
- Run the Style Menu Definitions query.
- Use the Site Override Objects and Details query.

Understanding Branding Queries

Oracle's PeopleSoft Enterprise Portal branding provides queries you can run that detail branding design data, site assignments, and theme assignments.

Common Elements Used in Branding Queries

App Pkg:Class:Method	The application package, class name, and method name.
Catalog Image Obj Name	The image object name if the image source is <i>Catalog</i> .
Custom Link URL	Destination defined for a custom link. The link may be to a site, HTML page, application, and so on.
Download Results In	Enables you to download query results in the following formats: <ul style="list-style-type: none">• Excel spreadsheet• CSV file (Comma-separated format.)
Effective Date, Eff Date	Denotes the effective date for a portal site, theme, override or any component parts of a theme, such as a header or footer.

Element ID	Displays the ID of the element.
Element Type	Displays the type of element.
External Image URL	Displays if the Image Source is <i>URL</i> . Specifies the location of the header or footer element image.
HTML Entered Text	HTML entered if the HTML source is <i>External</i> .
HTML Object Name, HTML Obj Name	The HTML object name if the HTML source is <i>Catalog</i> .
HTML Source	Source of the HTML. The valid options are: <ul style="list-style-type: none"> • <i>System Catalog</i>. The HTML source is a record in the Application Designer HTML catalog. • <i>External</i>. The HTML source is from an external source.
Header or Footer ID	The Header ID or Footer ID about which to generate information. Enter a header or footer name, or click the Lookup button to select among the defined headers and footers.
Homepage Footer ID, optnl	Displays the homepage Footer ID for the theme, if a footer exists on the homepage.
Homepage Header ID	Displays the homepage Header ID for the theme.
Image Object Name, Image Obj Name	Displays if the Image Source is <i>Catalog</i> . Indicates the name of the image object that displays for the header or footer element.
Image Source	Displays the source of any images associated with the header or footer. The valid options are: <ul style="list-style-type: none"> • <i>Catalog</i>. Indicates that the image is from the Application Designer Image Catalog. • <i>URL</i>. Indicates that the image source is located via a URL.
Menu Item Object Name	Object name for the menu item.
Portal Site Default Theme ID	The default theme ID for a portal site/registry.
Portal Site for Menu Item	The portal registry or site where the menu link is located.
Portal Site Name	Name of the portal site for which information is displayed. In some cases you must enter a portal site name, or click the Lookup button to select one.

Override Section	Indicates if the override value applies to the homepage header, homepage footer or target page header.
Site ID	The Site ID about which information is generated.
Status	Indicates the status of the element, theme and so on. The valid options are: <ul style="list-style-type: none"> • Active • Inactive
Style Class	Displays the class name associated with the header, footer or menu override.
Styled Menu ID, optnl override	Displays the styled menu ID for the homepage, if an override has been defined.
Stylesheet, optnl override	Displays the style sheet object name for the homepage, if an override has been defined.
Target Page Header ID	Displays the target page Header ID for the theme.
Theme Descr/Descr	Provides a description of the theme or portal site.
Theme ID	Displays the Theme ID.
View Results	Click the View Results button to generate query data based on the effective date you entered.

Running the Theme Definition Query

The Theme Definition query enables you to generate and view information about the active themes on the portal. All theme definitions are sorted by effective date.

Access the Theme Definition query page (Portal Administration, Branding, Branding Queries, Theme Definition).

PAPP_EPPBR_THEMES- Branding Themes Inquiry

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (6 kb)

[View All](#)

	Theme ID	Theme Descr	Eff Date	Status	Homepage Header ID	Target Page Header ID
1	PAPPBR_THEME1S_BLUE	Theme 1 Blue Simple	01/01/1900	Active	PAPPBR_HEADER1_SIMPLE	PAPPBR_HEADER1_SIMPLE
2	PAPPBR_THEME1_BLUE	Sample Blue Theme	01/01/1900	Active	PAPPBR_HEADER1_BASIC	PAPPBR_HEADER1_BASIC
3	PAPPBR_THEME1_GREEN	Sample Green Theme	01/01/1900	Active	PAPPBR_HEADER1_BASIC	PAPPBR_HEADER1_BASIC
4	PAPPBR_THEME2_GBI	Sample GBI Theme	01/01/1900	Active	PAPPBR_HEADER2_GBI	PAPPBR_HEADER2_GBINOTAB
5	PAPPBR_THEME3_IEONLY_CURVED	Branding Blue Curve Theme	01/01/1900	Active	PAPPBR_HEADER3_IEONLY_CURVED	PAPPBR_HEADER3_IEONLY_CURVED
6	PAPPBR_THEME4G_TOOLS	Tools 8.42 Guest Theme	01/01/1900	Active	PAPPBR_HEADER4_TOOLS_NOTAB	PAPPBR_HEADER4_TOOLS_NOTAB
7	PAPPBR_THEME4_TOOLS	Tools 8.42 Delivered Theme	01/01/1900	Active	PAPPBR_HEADER4_TOOLS	PAPPBR_HEADER4_TOOLS
8	PAPPBR_THEME5G_TOOLSCLASSIC	Tools 8.42 Classic Guest Theme	01/01/1900	Active	PAPPBR_HEADER5_TOOLSNOTAB	PAPPBR_HEADER5_TOOLSNOTAB
9	PAPPBR_THEME5_TOOLSCLASSIC	Tools 8.42 Classic Theme	01/01/1900	Active	PAPPBR_HEADER5_TOOLSCLASSIC	PAPPBR_HEADER5_TOOLSNOTAB
10	PAPPBR_THEME_CW	Collaborative Workspace Theme	01/01/1900	Active	PAPPBR_HEADER6_WORKSPACE	PAPPBR_HEADER6_WORKSPACE
11	PAPPBR_THEME_CW_SWAN	CW Theme - Swan Style	01/01/1900	Active	PAPPBR_HEADER7_WORKSPACE_SWAN	PAPPBR_HEADER7_WORKSPACE_SWAN
12	PAPPBR_THEME_PT_SWAN	Tools Swan Theme	01/01/1900	Active	PAPPBR_HEADER7_PT_SWAN	PAPPBR_HEADER7_PT_SWAN

Theme Definition query page 1 of 2

Target Page Header ID	Homepage Footer ID, optnl	Styled Menu ID, optnl override	StyleSheet, optnl override	Database Default Theme?
PAPPBR_HEADER1_SIMPLE	PAPPBR_FOOTER1_BASIC	PAPPBR_MENU2_GBI	EPPBR_BLUESTYLEDEF	N
PAPPBR_HEADER1_BASIC	PAPPBR_FOOTER1_BASIC	PAPPBR_MENU1_BLUE	EPPBR_BLUESTYLEDEF	N
PAPPBR_HEADER1_BASIC	PAPPBR_FOOTER1_BASIC	PAPPBR_MENU1_GREEN	EPPBR_GREENSTYLEDEF	N
PAPPBR_HEADER2_GBINOTAB	PAPPBR_FOOTER2_GENERIC	PAPPBR_MENU2_GBI	EPPBR_BLUE_GBI_STYLEDEF	N
PAPPBR_HEADER3_IEONLY_CURVED	PAPPBR_FOOTER3_IEONLY_CURVED	PAPPBR_MENU3_CURVED	EPPBR_BLUE_CURVE_STYLEDEF	N
PAPPBR_HEADER4_TOOLS_NOTAB	PAPPBR_FOOTER4_POWERED		EPPBR_TOOLSSTYLEDEF	N
PAPPBR_HEADER4_TOOLS	PAPPBR_FOOTER4_POWERED		EPPBR_TOOLSSTYLEDEF	Y
PAPPBR_HEADER5_TOOLSNOTAB	PAPPBR_FOOTER4_POWERED		EPPBR_TOOLSSTYLEDEF	N
PAPPBR_HEADER5_TOOLSNOTAB	PAPPBR_FOOTER4_POWERED		EPPBR_TOOLSSTYLEDEF	N
PAPPBR_HEADER6_WORKSPACE		PAPPBR_MENU6_WORKSPACE	EPPCW_STYLEDEF	N
PAPPBR_HEADER7_WORKSPACE_SWAN		PAPPBR_MENU6_WORKSPACE	EPPCW_STYLEDEF	N
PAPPBR_HEADER7_PT_SWAN	PAPPBR_FOOTER5_PT_SWAN	PAPPBR_MENU4_PT_SWAN	EPPBR_SWANSTYLEDEF	N

Theme Definition query page 2 of 2

Database Default Theme?

Indicates whether the theme is the database default.

Valid values are:

- *Y*. Indicates that the theme is the database default.
- *N*. Indicates that the theme is not the database default.

Information on other data used to generate this query or on data that the query displays is located at the start of this section.

Running the Database Default Theme Query

As its name implies, the Database Default Theme query provides details about the default theme running on the database.

Access the Database Default Theme query page (Portal Administration, Branding, Branding Queries, Database Default Theme).

PAPP_EPPBR_DFLT_THEME- Database Default Theme									
Download results in : Excel Spreadsheet CSV Text File XML File (1 kb)									
View All								First 1-1 of 1 Last	
Theme ID	Theme Descr	Database Default Theme as of	the Effective Date	Status	Homepage Header ID	Target Page Header ID	Homepage Footer ID, optnl	Styled Menu ID, optnl override	StyleSheet, optnl override
1 PAPPBR_THEME4_TOOLS	Tools 8.42 Delivered Theme	Y	01/01/1900	Active	PAPPBR_HEADER4_TOOLS	PAPPBR_HEADER4_TOOLS	PAPPBR_FOOTER4_POWERED		EPPBR_TOOLSSTYLEDEF

Database Default Theme query page

Database Default Theme as of Denotes whether the theme is the database default as of the effective date in the column to the right.

The valid values are:

- *Y.* Yes.
- *N.* No.

Information on other data used to generate this query or on data that the query displays is located at the start of this section.

See [Chapter 12, "Running Branding Queries," Common Elements Used in Branding Queries, page 139.](#)

Running the Portal Site Default Themes Query

The Portal Site Default Themes query enables you to generate information about site/portal registry default themes on the enterprise portal.

Access the Portal Site Default Themes query page (Portal Administration, Branding, Branding Queries, Portal Site Default Themes).

PAPP_EPPBR_REGISTRY_THEMES- Site Default Themes, Current

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All First [1-8 of 8](#) Last

	Portal Site Name	Eff Date	Portal Site Default Theme ID	Descr
1	CUSTOMER	01/01/1900	PAPPBR_THEME_PT_SWAN	Tools Swan Theme
2	DEMOSITE	01/01/1900	PAPPBR_THEME2_GBI	Sample GBI Theme
3	DEMO_WORKSPACE	01/01/1900	PAPPBR_THEME_CW_SWAN	CW Theme - Swan Style
4	DEMO_WORKSPACE_TEMPLATE	01/01/1900	PAPPBR_THEME_CW_SWAN	CW Theme - Swan Style
5	EMPLOYEE	01/01/1900	PAPPBR_THEME_PT_SWAN	Tools Swan Theme
6	PAPP_BASE_WIKI_TMPL	01/01/1900	PAPPBR_THEME_CW_SWAN	CW Theme - Swan Style
7	PAPP_BASE_WORKSPACE_TMPL	01/01/1900	PAPPBR_THEME_CW_SWAN	CW Theme - Swan Style
8	SUPPLIER	01/01/1900	PAPPBR_THEME_PT_SWAN	Tools Swan Theme

Portal Site Default Themes query page

A description of the data that the query displays is located in the Common Elements section at the start of this section.

See [Chapter 12, "Running Branding Queries," Common Elements Used in Branding Queries, page 139.](#)

Running the Themes Assigned to Roles Query

The Themes Assigned to Roles query enables you to generate information about the portal themes that are assigned to roles based on the Portal Site Name that you enter.

Access the Themes Assigned to Roles query page (Portal Administration, Branding, Branding Queries, Themes Assigned to Roles).

PAPP_EPPBR_ROLE_THEMES - Role Based Theme Assignment

Portal Site Name:

View Results

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All First [1-2 of 2](#) Last

	Portal Site Name	Assignment List Effective Date	Priority Seq#	Role Name	Assigned Theme ID
1	EMPLOYEE	01/01/1900	2	PAPP_SYSTEM_ADMIN	PAPPBR_THEME_PT_SWAN
2	EMPLOYEE	01/01/1900	200	PAPP_GUEST	PAPPBR_THEME5G_TOOLSCLASSIC

Themes Assigned to Roles query page

Assignment List Effective Date Displays the effective date of the role assignment list.

Priority Seq# Displays the priority sequence number of the role.

Role Name Displays the name of the role.

Assigned Theme ID Displays the theme ID assigned to the role.

Information on other data used to generate this query or on data that the query displays is located in the Common Elements section of this section.

See [Chapter 12, "Running Branding Queries," Common Elements Used in Branding Queries, page 139.](#)

Running the Header/Footer Objects and Details Queries

The primary purpose of the Header/Footer Objects and Details queries is to identify images, styles and HTML objects required for branding theme deployment.

The Header/Footer Objects query enables you to choose a header or footer defined for the PeopleSoft Enterprise Portal and generate basic information about the it, such as its effective date, ID, HTML layout name, and more. The Header/Footer Object Details query enables you to choose a header or footer defined for the PeopleSoft Enterprise Portal and generate detailed information about it.

Using the Header/Footer Objects Query

Access the Header/Footer Objects query page (Portal Administration, Branding, Branding Queries, Header/Footer Objects). Select the object name you wish to query, then press enter.

Eff Date	Header/Footer ID	HTML Layout Obj Name	Element ID	Element Type	Element Descr	Image Source	Catalog Image Obj Name	External Image URL	Style Class	HTML Area Source	HTML Obj Name	HTML Text	Pkg:Class:Method
01/01/1900	PAPPBR_FOOTER5_PT_SWAN	PAPPBR_HTMLFTR1_BASIC	6	Bar	Footer Bar One %6	Catalog				System Catalog			
01/01/1900	PAPPBR_FOOTER5_PT_SWAN	PAPPBR_HTMLFTR1_BASIC	11	Image	Image Row One, Repeating %11	Catalog	PS_EPPBR_SPACER			System Catalog			
01/01/1900	PAPPBR_FOOTER5_PT_SWAN	PAPPBR_HTMLFTR1_BASIC	12	Image	Image Row Two, Spacer %12	Catalog	PS_EPPBR_SPACER			System Catalog			
01/01/1900	PAPPBR_FOOTER5_PT_SWAN	PAPPBR_HTMLFTR1_BASIC	31	HTML Area/Text	Custom HTML Area%31	Catalog				External Source		Any Corporation PROPRIETARY and CONFIDENTIAL -- for INTERNAL USE ONLY; © 2009 Any Corporation, Inc. All rights reserved.	

Header and Footer Objects query displaying results for a query on the PAPPBR_FOOTER5_PT_SWAN

HTML Area Source

Three sources:

- *Appl Class.* Application class in Application Designer.
- *Catalog.* HTML catalog in Application Designer.
- *External.* HTML code is entered here.

HTML Text

Entered with the HTML Source is External.

Information on other data used to generate this query or on data that the query displays is located at the start of this section.

See [Chapter 12, "Running Branding Queries," Common Elements Used in Branding Queries, page 139.](#)

Using the Header/Footer Object Details Query

Access the Header/Footer Object Details query page (Portal Administration, Branding, Branding Queries, Header/Footer Object Details).

PAPP_EPPBR_HDR_DET_OBJS - Branding Objs Hdr/Ftr Details												
Header or Footer ID: <input type="text" value="PAPPBR_FOOTER5_PT_SWAN"/>												
View Results												
Download results in: Excel Spreadsheet CSV Text File XML File (4 kb)												
View All												
	Eff Date	Header/Footer ID	Element ID	Element Type	Label	Portal Site for Menu Item	Menu Item Object Name	Custom Link URL	Image/Icon Source	Catalog Image Obj Name	External Image URL	HTML Source
1	01/01/2000	PAPPBR_FOOTER5_PT_SWAN	6	Custom Link	Privacy Statement			./e/EPPCM_CONTENT_MGMT.EPPCM_PUB_VIEWER.GBL?EPPCM_CONTENTID=1408&PortalsPagelet=true&SHOW_CONTTITLE=N&SHOW_SUMMARY=N	System Catalog			System Catalog
2	01/01/1900	PAPPBR_FOOTER5_PT_SWAN	6	Custom Link	Privacy Statement			./e/EPPCM_CONTENT_MGMT.EPPCM_PUB_VIEWER.GBL?EPPCM_CONTENTID=1408&PortalsPagelet=true&SHOW_CONTTITLE=N&SHOW_SUMMARY=N	System Catalog			System Catalog

Header and Footer Object Details query displaying partial results for query on PAPPBR_FOOTER5_PT_SWAN

Image/Icon Source

Source of the image or icon. The valid options are:

- *System Catalog*. The source is a record in the Application Designer HTML catalog.
- *External*. The source is from an external source.

Information about other data that this query displays is located at the start of this section.

See [Chapter 12, "Running Branding Queries," Common Elements Used in Branding Queries, page 139.](#)

Running the Style Menu Definitions Query

Use the Style Menu Definitions query to generate a complete list of information about all styled menus for the portal.

Access the Styled Menu Definitions query page (Portal Administration, Branding, Branding Queries, Styled Menu Definitions).

PAPP_EPPBR_MENU_STYLE- Branding Styled Menu						
Download results in : Excel Spreadsheet CSV Text File XML File (7 kb)						
View All						
Re-Styled Menu ID	Overrides: Definition Label	Overriding Style Sheet	Alternate Style Sheet	Background Style	Alternate Bckgrnd Style	Open Folder Bckgrnd Style
1 PAPPBR_MENU1_BLUE	Sample menu 1 (blue)	EPPSTYLEDEF	PSSTYLEDEF_ALT			
2 PAPPBR_MENU1_GREEN	Sample menu 1 (green)	EPPBR_GREENMENU_STYLEDEF	EPPBR_GREENMENU_STYLEDEF_ALT	EPPBRGREENNAVBBACKGROUND		EPPBRGREENNAVSELPARENTBK
3 PAPPBR_MENU2_GBI	GBI menu styles	EPPBR_BLUE_GBI_STYLEDEF	EPPBR_BLUE_GBI_STYLEDEF	GBIPTNAVBACKGROUND		GBIPTNAVSELPARENTBK
4 PAPPBR_MENU3_CURVED	Blue curve menu styles	EPPSTYLEDEF				
5 PAPPBR_MENU4_PT_SWAN	Tools Menu - Swan	PSSTYLEDEF_SWAN				
6 PAPPBR_MENU6_WORKSPACE	Workspace menu	EPPCW_STYLEDEF	EPPCW_STYLEDEF			

Styled Menu Definitions query page (1 of 3)

Re-Styled Menu ID	Name of the restyled menu.
Overrides: Definition Label	Description of the override definition.
Overriding Style Sheet	Name of the overriding style sheet.
Alternate Style Sheet	Style sheet applied for browsers other than Microsoft Internet Explorer and Netscape Navigator 6.0.
Background Style	Name of the applied background style.
Alternate Bckgrnd Style	Background style applied for browsers other than Microsoft Internet Explorer and Netscape Navigator 6.0.
Open Folder Bckgrnd Style	Name of the background style for open folders.
Folder Edge Style	Style name for the folder edge.
Folder Link Style	Name of the style applied for folder links.

Folder Edge Style	Folder Link Style	Selected Link Bckgrnd Style	Selected Link Style	Unselected Link Style	Selected Link Top Edge	Selected Link Bottom Edge
EPPBRGREENNAVSELPARENTEDEGE	EPPBRGREENNAVPARENTLINK	EPPBRGREENNAVSELCHILDBK	EPPBRGREENNAVLINK	EPPBRGREENNAVLINK	EPPBRGREENNAVSELCHILDEDEDGK	EPPBRGREENNAVSELCHILDEDEDGELT
GBIPTNAVSELPARENTEDEGE	GBIPSNVAPARENTLINK	GBIPTNAVSELCHILDBK	GBIPTNAVSELCHILDLINK	GBIPTNAVLINK	GBIPTNAVSELCHILDEDEDGK	GBIPTNAVSELCHILDEDEDGELT

Styled Menu Definitions query page (2 of 3)

- Selected Link Bckgrnd Style** Name of the background style applied for selected links.
- Selected Link Style** Name of the style applied for selected links.
- Unselected Link Style** Name of the style applied for links not selected links.
- Selected Link Top Edge** Name of the style applied for the top edge of selected links.
- Selected Link Bottom Edge** Name of the style applied to the bottom edge of selected links.
- Expand Menu Image** Name of the menu image that displays when the menu is expanded.
- Close Menu Image** Name of the menu image that displays when the menu is closed.

Expand Menu Image	Close Menu Image	Unselected Link Image	Selected Link Image	Open Folder Image	Collapse Folder Image	Indentation Spacer Image
PS_EPPBR_SHOW_MENU1	PS_EPPBR_HIDE_MENU1	PS_EPPBR_NAV_BULLET1_BLUE	PS_EPPBR_NAV_REVERSE_BULLET1	PS_EPPBR_NAV_OPEN_FLDR1_BLUE	PS_EPPBR_NAV_CLOSED_FLDR1_BLUE	
PS_EPPBR_SHOW_MENU_GREEN	PS_EPPBR_HIDE_MENU_GREEN	PS_EPPBR_NAV_BULLET1_GREEN	PS_EPPBR_NAV_REVERSE_BULLET1	PS_EPPBR_NAV_OPEN_FLDR1_GREEN	PS_EPPBR_NAV_CLOSED_FLDR1_GREE	
PS_EPPBR_SHOW_MENU_CLASSIC	PS_EPPBR_HIDE_MENU_TRANS					
PS_EPPBR_T3IMG_SHOWMENU	PS_EPPBR_T3IMG_HIDEMENU					
PS_EPPBR_SHOW_MENU1	PS_EPPBR_HIDE_MENU1	PS_EPPBR_NAV_BULLET1_BLUE	PS_EPPBR_NAV_REVERSE_BULLET1	PS_EPPBR_NAV_OPEN_FLDR1_BLUE	PS_EPPBR_NAV_CLOSED_FLDR1_BLUE	

Styled Menu Definitions query page (3 of 3)

- Unselected Link Image** Name of the image that is not selected.
- Selected Link Image** Name of the selected link image.
- Open Folder Image** Name of the open folder image.
- Collapsed Folder Image** Name of the collapsed folder image.

Indentation Spacer Image Name of the indentation spacer image.

Using the Site Override Objects and Detail Queries

Similar to the Header/Footer Objects and Header/Footer Object Details queries, the primary purpose of the Site Override Objects and Detail queries is to identify site override objects in preparation for branding theme deployment.

Use the Site Override Objects query to generate general information about site overrides defined for portal sites. Use the Site Overrides Detail query to generate detailed information about site overrides defined for bar items links and text. Compare this information with the general object queries to compile a complete list of objects required for a site branding design.

Using the Site Override Objects Query

The Site Override Objects query enables you to generate basic information about overrides defined for a site, such as effective date, ID, element ID and image and bar overrides.

Access the Site Override Objects query page (Portal Administration, Branding, Branding Queries, Site Override Objects).

PAPP_EPPSM_SITE_GEN_OBJS - Site Branding OverridesGeneral

Site ID:

View Results

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (6 kb)

View All First Last

	Site ID	Override Section	Element ID	Effective Date	Image Source	Catalog Image Obj Name	External Image URL	HTML Area Source	HTML Text	HTML Obj Name	Pkg:Class:Method	Style
1	DEMOSITE	Homepage Header	8	01/01/1900	Catalog			System Catalog				GBIHEADC3R1
2	DEMOSITE	Homepage Header	31	01/01/1900	Catalog	PS_EPPBR_DEMO_GBIFACLOGO		System Catalog				
3	DEMOSITE	Target Page Header	8	01/01/1900	Catalog			System Catalog				GBIHEADC3R1
4	DEMOSITE	Target Page Header	31	01/01/1900	Catalog	PS_EPPBR_DEMO_GBIFACLOGO		System Catalog				

Site Override Objects query page displaying results for a query on the Site ID DEMOSITE

Style The name of the style applied to the bar element.

Information about the data that the query displays is located at the start of this section.

See [Chapter 12, "Running Branding Queries," Common Elements Used in Branding Queries, page 139.](#)

Using the Site Override Object Details Query

The Site Override Object Details query enables you to generate detailed information about site bar overrides.

Access the Site Override Object Details query page (Portal Administration, Branding, Branding Queries, Site Override Object Details).

PAPP_EPPSM_SITE_DTL_OBJS - Site Branding Overrides Detail

Site ID:

View Results

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (13 kb)

View All First Last

	Override Effective Date	Site ID	Override Section	Element ID	Element Type	Portal Site for Menu Item	Menu Item Object Name	Custom Link URL	Image / Icon Source	Catalog Image Obj Name	External Image URL	HTML Source	HTML Obj Name	HTML Entered Text	App Pkg:Class:Method	Style Class
1	01/01/1900	DEMOSITE	Homepage Header	8	Link to Default Portal Home				System Catalog			System Catalog				GBIHEADERLINKBLUEBG
2	01/01/1900	DEMOSITE	Homepage Header	8	Plain Text				System Catalog			System Catalog				GBIHEADERLINKBLUEBG
3	01/01/1900	DEMOSITE	Homepage Header	8	Link to Portal/Site Home				System Catalog			System Catalog				GBIHEADERLINKBLUEBG
4	01/01/1900	DEMOSITE	Target Page Header	8	Link to Default Portal Home				System Catalog			System Catalog				GBIHEADERLINKBLUEBG
5	01/01/1900	DEMOSITE	Target Page Header	8	Link to Portal/Site Home				System Catalog			System Catalog				GBIHEADERLINKBLUEBG
6	01/01/1900	DEMOSITE	Target Page Header	8	Plain Text				System Catalog			System Catalog				GBIHEADERLINKBLUEBG

Site Override Object Details query page displaying results for a query on the Site ID DEMOSITE

Style The style applied to the bar item.

Information about the data that the query displays is located at the start of this section.

See [Chapter 12, "Running Branding Queries," Common Elements Used in Branding Queries, page 139.](#)

Appendix A

Using Bind Variables

This appendix provides an example of branding using bind variables from previous releases of Enterprise Portal, and contains an example for creating and configuring custom branding headers with bind variables.

Understanding Bind Variables

Branding system elements are simply the bind variables embedded in the HTML that are used for Branding headers and footers. The bind variables are replaced with actual values at run time to generate HTML.

The PeopleCode example below shows how dynamic content is embedded into static content using a bind variable: `` The value of the bind number can be found in the calling PeopleCode program that binds the object to the HTML definition. `&HTML = GetHTMLText(HTML.TEST, "www.peoplesoft.com")`

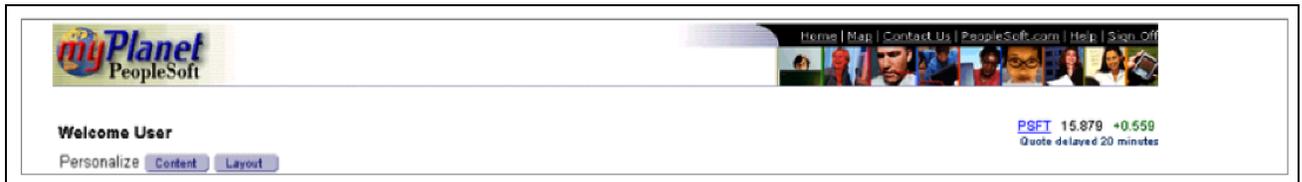
By providing a set of predefined bind variables as system elements, the Branding PeopleCode program will know how to assemble the HTML syntax according to the system element assigned. Keep in mind that any changes to the system element number and type are not allowed. You should also include all non-configurable system JavaScript/HTML %binds, as they reference JavaScript files (TimeOut warnings, for example), forms, or additional HTML that enable the system to work properly.

Example: Creating and Configuring Custom Branding Headers with Bind Variables

This section provides an example for creating and configuring a custom header, using the steps discussed earlier in this chapter, and describes how to:

- Generate the header HTML.
- Identify HTML syntax to replace with branding system elements.
- Replace identified HTML syntax with bind variables.
- Configure the header.

This example demonstrates how to create the following header.



Header created in this example

Generating the Header HTML

PeopleSoft Enterprise Portal delivers the *EPPBR_HDRHTML_BASE HTML* HTML object as the base for creating any new header for use with branding.

To generate the HTML for the header:

1. In Application Designer, open the *EPPBR_HDRHTML_BASE HTML* definition.
2. The object opens and you can view the object HTML.

```

<html>
<head>
%bind(:21)
<title></title>
<!-- title is generated by Tools-->
<meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
<!--system generated HTML %bind22, %bind23, %bind24, %bind25, %bind26, %bind27-->
<script language='javascript' src='%bind(:22)'\></script>
<script language='javascript' src='%bind(:23)'\></script>
%bind(:24)
%bind(:25)
%bind(:26)
%bind(:27)
<!--%bind16, %bind17-->
<LINK REL="stylesheet" HREF="%bind(:16)" TYPE="text/css">
<LINK REL="stylesheet" HREF="%bind(:17)" TYPE="text/css">
<style type="text/css">
<!--ADD CUSTOM STYLES HERE-->
</style>
</head>

<body bgcolor="#FFFFFF" text="#000000" leftmargin="0" topmargin="0"
marginwidth="0"marginheight="0">

<!--custom HTML begins-->
<!--ADD CUSTOM HTML HERE-->
<!--custom HTML ends-->

<!--system generated HTML %bind28, %bind29, %bind30-->
%bind(:28)
%bind(:29)
%bind(:30)
<!--system reserved elements HTML %bind19, %bind20-->
%bind(:19)
%bind(:20)
</body>
</html>

```

3. Save the HTML object with the name *PLANET_PSFT_HDR_HTML*.

4. Copy your custom HTML and insert into the <!--ADD CUSTOM HTML HERE--> section of the previously displayed HTML object. It is assumed that you have already created the basic HTML for your interface outside of the PeopleSoft system.
5. Remove all scripts and functions, if any, from the custom HTML you pasted into the HTML object in the previous step.

Make note of any additional custom scripts and functions within the header. Branding takes care of reinserting all delivered scripts and functions. This is performed by system elements 21 to 30. You will allocate additional system elements for custom scripts and functions. You can also choose to leave custom scripts and functions in the HTML object. Keep layout reusability and ease of maintenance in mind when making this decision.

6. Save the file.

Identifying HTML Syntax to Replace with Branding System Elements

This section discusses identifying HTML syntax to replace by system elements.

To identify custom HTML syntax to replace with branding system elements:

1. In the PeopleSoft Pure Internet Architecture, select Portal Administration, Branding, Define Elements, Enable HTML Layouts.
2. Add a new value and set the HTML Layout ID to *PLANET_PSFT_HDR_LAYOUT*, and then do the following:
 - a. Enter a description.
 - b. Select an HTML Object name of *PLANET_PSFT_HDR_HTML*.
 - c. Select a layout type of *Header*.

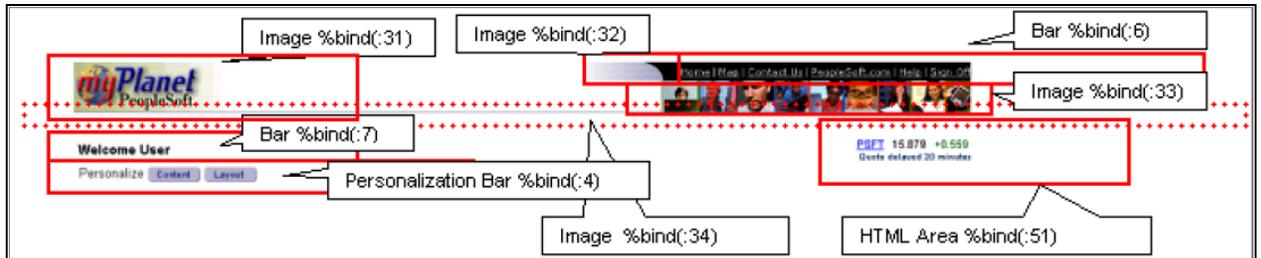
A list of applicable branding elements displays.

3. Analyze the custom HTML from step 1, according to the element list.

To make this task easier, you may want to use an external text editor, highlighting the syntax that you want to convert to system elements. In addition, highlight the attributes and styles that go along with the system elements.

- The more HTML syntax you move out of the layout HTML object and into system elements, the fewer changes you will likely need to make to the layout HTML object.

For example, instead of changing the layout HTML object, you can use system elements on the fly to change the look and feel of a portal header. Using system elements makes your HTML layout more reusable and flexible.



Identifying potential system elements in your header

- On the HTML Layouts and Element Selection page, select the applicable system elements for the header and enter custom labels.

HTML Layouts and Element Selection

Start by selecting an HTML object and Layout Type. Then, select the Elements used in the HTML Object. The HTML object's bind values must be an exact functional match to the Elements listed here. Alter the Custom Label to provide clarity during the Header and Footer definition tasks. Mark the Element Required if it must always be defined with a value.

HTML Layout ID: PAPPBR_PLCMTHDR1_BASIC

*Description:

*HTML Object Name: [Add New HTML](#) [View HTML Text](#)

Layout Type: Header

ID	Select	Required Element	Element Name	*Custom Label
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	My Links %1	My Links %1
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Search Options %2	Search Options %2
3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Homepage Help Display %3	Homepage Help Display %3
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Personalization %4	Personalization Links %4
5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tab Display %5	Homepage Tab Display %5
6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Header Bar One %6	Header Main Bar One %6
7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Header Bar Two %7	Header Greeting Bar Two %7
8	<input type="checkbox"/>	<input type="checkbox"/>	Header Bar Three %8	Header Bar Three %8

HTML Layouts and Element Selection page

Following is the original HTML. Text highlighted in bold denotes style class code.

```

<table border="0" width="100%" cellspacing="0" cellpadding="0">
<tr valign="top">
<td valign="top" rowspan="2"><a proxied="false" href="http://my.company.com/
/servlets/psportal/peoplesoft8/?cmd=start">
=>
"0"></a>
</td>
<td rowspan="2" width="100%"></td>
<td valign="top" align="right">
<table bgcolor="#ffffff" border="0" cellpadding="0" cellspacing="0">
<tr valign="top">
<td valign="top" width="87" align="right">
"21" border="0">
</td>
<td bgcolor="#000000" nowrap valign="middle" align="right"><font color="#FFFFFF"><a=>
=>
proxied="false" href="http://my.company.com/servlets/psportal/peoplesoft8/?cmd==>
start" target="_parent" class="EBIZ_WHITE_HYPERLINK">Home</a> | <a href="http://
//my.company.com/servlets/psportal/peoplesoft8/?url=http%3a%2f%2fmy.company.com%2fs=>
=>
ervlets%2ficlientservlet%2fpeoplesoft8%2f%3fICType%3dScript%26target%3dmain%26ICScr=>
=>
iptProgramName%3dWEBLIB_EBIZ_LNK.ISCRIPT1.FieldFormula.IScript_>
Dir%26ID%3d0000000001" target="_parent" class="EBIZ_WHITE_HYPERLINK">Map</a> | <a=>
href="http://my.company.com/servlets/psportal/peoplesoft8/?url=>
http%3a%2f%2fmy.company.com%2fservlets%2ficlientservlet%2fpeoplesoft8%2f%3f=>
ICType%3dPanel%26Menu%3dADMINISTER_EBIZ%26Market%3dGBL%26PanelGroupName%3dEBIZ_>
CONTACT_US" target="_parent" class="EBIZ_WHITE_HYPERLINK">Contact Us</a> | <a=>
href="http://my.company.com/servlets/psportal/peoplesoft8/?url=>
http%3a%2f%2fwww.peoplesoft.com" target="_parent" class="EBIZ_WHITE_HYPERLINK">
>PeopleSoft.com</a> | <a href="javascript:void window.open('http://
//my.company.com/servlets/iclientservlet/peoplesoft8/?ICType=Script&target=>
main&ICScriptProgramName=WEBLIB_EBIZ_LNK.ISCRIPT1.FieldFormula.IScript_>
Hlp&ID=0000000004', 'Help', 'width=800,height=600,resizable=>
yes,directories=no,toolbar=no,menubar=no,location=no,copyhistory=no');" target="=>
parent" class="EBIZ_WHITE_HYPERLINK" style="cursor:help">Help</a> | <a proxied=>
"false" href="http://my.company.com/servlets/psportal/peoplesoft8/?cmd=>
logout" target="_parent" class="EBIZ_WHITE_HYPERLINK">Sign Off</a>&nbsp;&nbsp;</font>
</td>
</tr>
</table>
</td>
</tr><tr valign="top">
<td align="right" valign="top">
</td>
</tr>
</table>
<table border="0" width="100%" cellspacing="0" cellpadding="0">
<tr valign="top">
<td valign="top" bgcolor="#B2B2CB"></td>

```


Replacing Identified HTML Syntax With Bind Variables

In this example, the following bind variables will replace the sections of custom HTML in italics in the previous examples as indicated here:

%bind(:31) This bind variable replaces the following custom HTML in the previous section:

```
<a proxied="false" href="http://my.company.com/servlets/psportal/peoplesoft8/?cmd=start"></a>
```

%bind(:32) This bind variable replaces the following custom HTML in the previous section:

```

```

%bind(:33) This bind variable replaces the following custom HTML in the previous section:

```

```

%bind(:34) This bind variable replaces the following custom HTML in the previous section:

```

```

%bind(:6)

This bind variable replaces the following custom HTML in the previous section:

```
<td bgcolor="#000000" nowrap valign="middle" align="right">
<font color="#FFFFFF"><a proxied="false" href="http://my.co
mpany.com/servlets/psportal/peoplesoft8/?cmd=start" target=
"_parent" class="EBIZ_WHITE_HYPERLINK">Home</a> | <a href="
http://my.company.com/servlets/psportal/peoplesoft8/?url=ht
tp%3a%2f%2fmy.company.com%2fservlets%2ficlientservlet%2fpeo
plesoft8%2f%3fICType%3dScript%26target%3dmain%26ICScriptPro
gramName%3dWEBLIB_EBIZ_LNK.ISCRIPT1.FieldFormula.IScript_Di
r%26ID%3d0000000001" target="_parent" class="EBIZ_WHITE_HYP
ERLINK">Map</a> | <a href="http://my.company.com/servlets/p
sportal/peoplesoft8/?url=http%3a%2f%2fmy.company.com%2fserv
lets%2ficlientservlet%2fpeoplesoft8%2f%3fICType%3dPanel%26M
enu%3dADMINISTER_EBIZ%26Market%3dGBL%26PanelGroupName%3dEBI
Z_CONTACT_US" target="_parent" class="EBIZ_WHITE_HYPERLINK"
>Contact Us</a> | <a href="http://my.company.com/servlets/p
sportal/peoplesoft8/?url=http%3a%2f%2fwww.peoplesoft.com" t
arget="_parent" class="EBIZ_WHITE_HYPERLINK">PeopleSoft.com
</a> | <a href="javascript:void window.open('http://my.comp
any.com/servlets/iclientservlet/peoplesoft8/?ICType=Script&
amp;target=main&ICScriptProgramName=WEBLIB_EBIZ_LNK.ISC
RIPT1.FieldFormula.IScript_Hlp&ID=0000000004', 'Help', '
width=800,height=600,resizable=yes,directories=no,toolbar=no
,menubar=no,location=no,copyhistory=no');" target="_>
parent"
  class="EBIZ_WHITE_HYPERLINK" style="cursor:help">Help</a>=>
|
<a proxied="false" href="http://my.company.com/servlets/psp
ortal/peoplesoft8/?cmd=logout" target="_parent" class="EBIZ
_WHITE_HYPERLINK">Sign Off</a>&nbsp;</font>
```

%bind(:4)

This bind variable replaces the following custom HTML in the previous section:

```
<a href="http://my.company.com/servlets/psportal/peoplesoft
8/?url=http%3a%2f%2fmy.company.com%2fservlets%2ficlientserv
let%2fpeoplesoft8%2f%3fICType%3dPanel%26Menu%3dPORTAL_PERS_
HOMEPAGE%26Market%3dGBL%26PanelGroupName%3dPORTAL_HOMEPAGE%
26PORTALPARAM_PAGE%3dCONTENT"></a> <a href="ht
tp://my.company.com/servlets/psportal/peoplesoft8/?url=http
%3a%2f%2fmy.company.com%2fservlets%2ficlientservlet%2fpeopl
esoft8%2f%3fICType%3dPanel%26Menu%3dPORTAL_PERS_HOMEPAGE%26
Market%3dGBL%26PanelGroupName%3dPORTAL_HOMEPAGE%26PORTALPAR
AM_PAGE%3dLAYOUT"></a><br>
```

%bind(:7)

This bind variable replaces the following custom HTML in the previous section:

Welcome User

%bind(:51)

This bind variable replaces the following custom HTML in the previous section:

```
<!--Begin iclientcomponent: PSFT%20Stock URL: http://my.com
pany.com/servlets/iclientservlet/peoplesoft8/?ICType=Script
&ICScriptProgramName=WEBLIB_EBIZ.ISCRIPT1.FieldFormula.IScr
ipt_PSFT_Stock--><span>
<table border="0" cellpadding="0" cellspacing="0" width='10
0%'><tr><td nowrap><a href='http://my.company.com/servlets/
psportal/peoplesoft8/?url=http%3a%2f%2ffinance.yahoo.com%2f
q%3fs%3dPSFT%26d%3dt' title='Last updated on 3/12/2003 at E
T' class='PSHYPERLINK'>PSFT</a> &nbsp;&nbsp;&nbsp;15.352&nbsp;&nbsp;&nbsp;
&nbsp;&nbsp;&nbsp;<font color='#008000'>+0.032</font>&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;<br><cen
ter><font size="1"><a href='http://my.company.com/servlets/
psportal/peoplesoft8/?url=http%3a%2f%2fplanetx.peoplesoft.c
om%2fdisclaimer%2fstockquote.htm'>Quote delayed 20 minutes<
/a></font></center></td></tr></table></span><!--End iclient
component: PSFT%20Stock -->
```

To replace custom HTML with bind variables:

- If you are using only a few styles and they are not likely to be shared, embed the styles in the <head> section of the *PLANET_PSFT_HDR_HTML* object. Paste the style classes into the HTML object area marked with the following note: <!--ADD CUSTOM STYLES HERE-->.
- If the styles you are using are reusable, convert them into a PeopleSoft style sheet and use the style sheet in a theme in which the header will be deployed.
- You can also link to an external cascading style sheet, (CSS), as you do when you are coding normal HTML.

Add custom JavaScript Functions or scripts. The following two options are available:

- Use system elements 51-60 to add additional HTML areas.
- Embed the code in the HTML object.

Save the *PLANET_PSFT_HDR_HTML_HTML* object.

The following example shows the final HTML object code:

```

<html>
<head>
%bind(:21)
<title></title>
<!-- title is generated by Tools-->
<meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
<!--system generated HTML %bind22, %bind23, %bind24, %bind25, %bind26, %bind27-->
<script language='javascript' src='%bind(:22)'\></script>
<script language='javascript' src='%bind(:23)'\></script>
%bind(:24)
%bind(:25)
%bind(:26)
%bind(:27)
<!--%bind16, %bind17-->
<LINK REL="stylesheet" HREF="%bind(:16)" TYPE="text/css">
<LINK REL="stylesheet" HREF="%bind(:17)" TYPE="text/css">
<style type="text/css">
<!--custom style begins-->
.EBIZ_WHITE_HYPERLINK {font-family: "Verdana","Arial","sans-serif";
font-size:8pt; font-weight: normal; font-Style: normal; font-variant:
normal; color: rgb(255,255,255); word-spacing: normal; letter-spacing:
normal; line-height: normal; white-space: normal;}
.EBIZ_WHITE_HYPERLINK:HOVER {font-family: "Verdana","Arial","sans-serif";
font-size: 8pt; font-weight: normal; font-Style: normal; font-variant:
normal; color: rgb(178,178,208); word-spacing: normal; letter-spacing:
normal; line-height: normal; white-space: normal;}
.EBIZ_STDTEXT {font-size: 10pt; padding-right: 3px; padding-left: 3px}
.EBIZ_STDTEXT_NO_UL {font-size: 10pt; text-decoration: none; }
<!--custom style ends-->
</style>
</head>
<body bgcolor="#FFFFFF" text="#000000" leftmargin="0" topmargin="0" marginwidth="0"
marginheight="0">
<!--custom style begins-->
<table border="0" width="100%" cellpadding="0" cellspacing="0">
  <tr valign="top">
    <td rowspan="2" valign="top" colspan="2">%bind(:31)</a>
    </td>
    <td rowspan="2" width="100%"></td>
    <td rowspan="2" valign="top" align="right">
      <table bgcolor="#ffffff" border="0" cellpadding="0"
      cellspacing="0">
        <tr valign="top">
          <td rowspan="2" align="right" colspan="2">%bind(:32)
          </td>
          <td colspan="2">%bind(:6)</td>
        </tr>
        <tr>
          <td colspan="2"></td>
        </tr>
      </table>
    </td>
  </tr>
  <tr valign="top">
    <td align="right" colspan="2">%bind(:33)</td>
  </tr>
</table>

<table border="0" width="100%" cellpadding="0" cellspacing="0">
  <tr valign="top">
    <td align="top" colspan="2">
      <td align="top" bgcolor="#B2B2CB">%bind(:34)</td>
    </tr>
</table>

<table border="0" cellpadding="0" cellspacing="0" width="100%">
  <tr height="100%" valign="top">
    <td width="100%" class="STRONG">%bind(:7)</td>
  </tr>

```

```

        <td align="right" nowrap>%bind(:51)</td>
    </tr>
</table>

<table border="0" cellpadding="0" cellspacing="0" width="20%" height="100%">
    <tr height="100%" valign="top">
        <td></td>
        <td valign="top" class="EBIZ_STDTEXT" nowrap>
            %bind(:4)
        </td>
    </tr>
</table>

<!--custom HTML ends-->
<!-- system generated HTML %bind28-->
<!--system generated HTML %bind29, %bind30-->
%bind(:29)
%bind(:30)
<!--system reserved elements HTML %bind19, %bind20-->
%bind(:19)
%bind(:20)
</body>
</html>

```

Configuring the Header

To configure the header:

1. Click the Add New Value tab.
2. In the Header ID field, enter *PLANET_PSFT_NDR*.
3. In the Description field, enter a description.
4. In the HTML Layout ID field enter *PLANET_PSFT_HDR_LAYOUT*.
5. Save the changes.

Access the Images, Bars and HTML Area tabs and set values based on the styles you added when you replaced custom HTML with bind variables in the previous section. For example:

1. Images—Use the Images tab to move images into the database or specify a URL as the image source.
2. Bars—Use the Bars tab to specify style classes for the bars and individual bar items as necessary.
3. HTML areas—The system does not support iScripts, there you have to convert the iScript into application class code (PLANET_APP_PACKAGE:GetStockInfo:GetStockHTML) to generate the stock quote.

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