
PeopleSoft Interaction Hub 9.1: Branding

September 2014

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Note: Only the most current release of hosted documentation is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

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

Common Help Documentation

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

- Application Fundamentals
- Using PeopleSoft Applications

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

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

Field and Control Definitions

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

Typographical Conventions

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

<i>Typographical Convention</i>	<i>Description</i>
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.

<i>Typographical Convention</i>	<i>Description</i>
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>
⇒	<p>This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.</p>

ISO Country and Currency Codes

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

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

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

Region and Industry Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

- USF (U.S. Federal)
- E&G (Education and Government)

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Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

About PeopleSoft Interaction Hub

This section discusses:

- PeopleSoft Portal Solutions product family.
- PeopleSoft Interaction Hub and PeopleTools.

PeopleSoft Portal Solutions Product Family

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

- PeopleSoft Interaction Hub.
- PeopleSoft Internal Controls Enforcer.

PeopleSoft Interaction Hub

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

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

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

- First, PeopleSoft Interaction Hub is a traditional portal framework that can be used for aggregating and managing content from multiple applications and sources. With unified navigation, it is now simple to configure PeopleSoft Interaction Hub to federate multiple PeopleSoft application systems.
- Second, its collaborative capabilities make PeopleSoft Interaction Hub a functional application that complements the features found in PeopleSoft applications.

PeopleSoft Internal Controls Enforcer

Oracle's PeopleSoft 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 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 the product documentation for Internal Controls Enforcer.

PeopleSoft Interaction Hub and PeopleTools Portal Technology

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

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

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

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

See *PeopleTools: Portal Technology*.

Related Documentation

This section discusses:

- PeopleSoft Interaction Hub documentation.
- PeopleTools documentation.

PeopleSoft Interaction Hub Documentation

PeopleSoft Interaction Hub documentation includes:

- *PeopleSoft Interaction Hub: Branding*

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

- *PeopleSoft Interaction Hub: Collaborative Workspaces*

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

- *PeopleSoft Interaction Hub: Content Management System*

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

- *PeopleSoft Interaction Hub: Portal and Site Administration*

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

- *PeopleSoft Interaction Hub: Resource Finder*

This subject 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.

- *PeopleSoft Interaction Hub: Using Portal Features*

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

PeopleTools Documentation

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

- *PeopleTools: Feed Publishing Framework*

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

- *PeopleTools: Integration Broker*

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

- *PeopleTools: Portal Technology*

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

- *PeopleTools: Security Administration*

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

- *PeopleTools: Applications User's Guide*

This subject provides general information about PeopleSoft applications useful to all users of PeopleSoft systems. Topics include an introduction to the PeopleSoft Pure Internet Architecture, explanation of how to navigate through the system, how to perform searches, elements of application pages, and so on.

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

PeopleSoft Portal Solutions Related Links

[PeopleSoft Interaction Hub 9.1 Documentation Home Page \[ID 887960.1\]](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

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Chapter 1

Getting Started with Branding in PeopleSoft Interaction Hub

Branding Overview: PeopleTools and PeopleSoft Interaction Hub

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

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

With PeopleTools branding, you can apply branding definitions to:

- The entire system.
- Individual portals.
- Users by role or permission list.
- Individual classic components.
- Fluid components by node.

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

Additional Features in PeopleSoft Interaction Hub

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

- Branding WorkCenter

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

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

These branding definitions incorporate PeopleSoft Interaction Hub-specific features, such as My Links and the Guest homepage, into branding for the portal. See [Understanding Delivered Branding Definitions](#) for more information.

- Custom Tabs custom tabs navigation collection.

This Custom Tabs custom tabs navigation collection is delivered with 12 pre-defined links as sample data. See [Custom Tabs Navigation Collection](#) for more information.

Chapter 2

Branding Definitions Delivered in PeopleSoft Interaction Hub

Understanding Delivered Branding Definitions

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

- Branding themes, header definitions, and skin style sheets.
- Branding theme assignments.
- Branding system element definitions.
- Branding user attribute definitions.
- Custom Tabs navigation collection.

Themes, Headers, and Skins

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

Theme	Homepage Header¹	Footer	Theme Style Sheet (Classic)	Skins
PAPPBR_THEME_TANGERINE	PAPPBR_HEADER9_PT_TANGERINE	DEFAULT_FOOTER ²	NA	PAPPBR_GUEST_SKIN
PAPPBR_THEME_TANGERINE_ALT	PAPPBR_HEADER9_TANGERINE_ALT	DEFAULT_FOOTER ²	DEFAULT_THEME_TANGERINE_ALT	PAPPBR_GUEST_SKIN
PAPPBR_THEME_CW_TANGERINE	PAPPBR_HEADER9_WORKSPACE_TANG	DEFAULT_FOOTER ²	NA	NA
PAPPBR_THEME_OOWDEMO	PAPPBR_HEADER10_OOWDEMO	NA	PAPP_OOW_THEME_CSS	NA

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

² The DEFAULT_FOOTER definition is delivered with PeopleTools.

This topic is organized by these branding theme definitions:

- PAPPBR_THEME_TANGERINE
- PAPPBR_THEME_TANGERINE_ALT
- PAPPBR_THEME_CW_TANGERINE
- PAPPBR_THEME_OOWDEMO

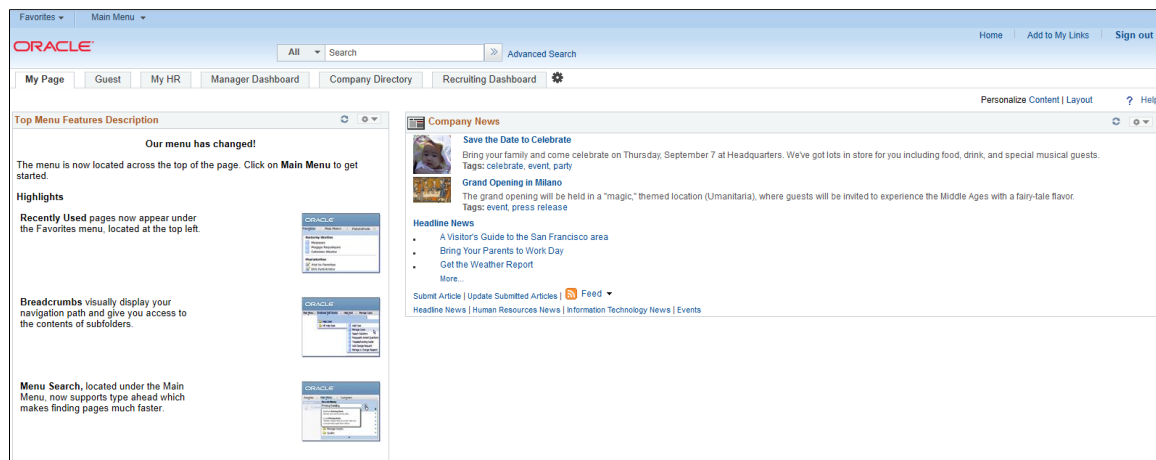
PAPPBR_THEME_TANGERINE Theme

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

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

Image: Portal homepage using the PAPPBR_THEME_TANGERINE theme

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



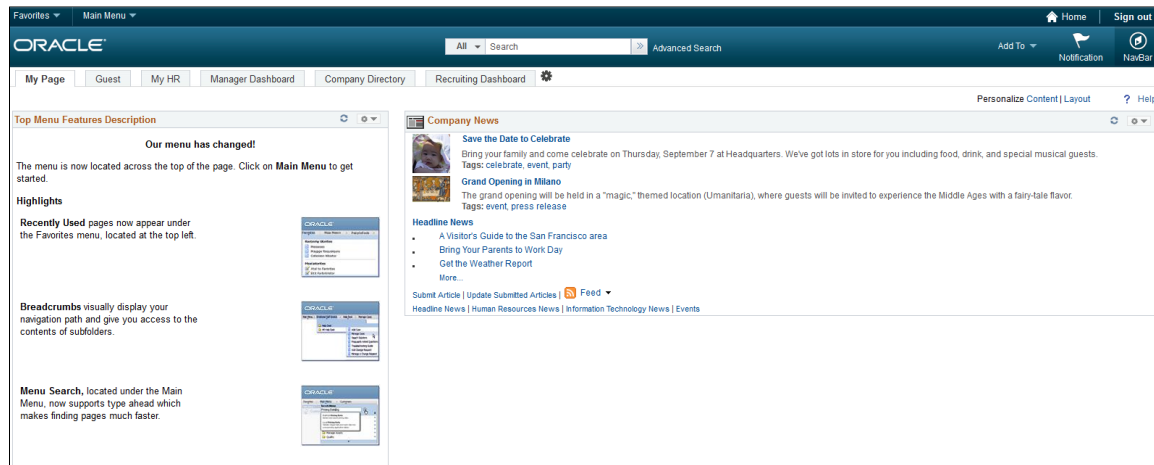
PAPPBR_THEME_TANGERINE_ALT Theme

The PAPPBR_THEME_TANGERINE_ALT theme is an alternate branding theme for portals and sites that presents a portal header that is compatible with PeopleSoft fluid components and that is also compatible with the Tangerine (PT8.53 default) theme style family. This theme includes PeopleSoft Interaction Hub-specific modifications to DEFAULT_THEME_TANGERINE_ALT—for example, My

Links features are enabled in the Favorites drop-down menu; however, Add to My Links is not displayed in the portal header.

Image: Portal homepage using the PAPPBR_THEME_TANGERINE_ALT theme

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



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

- Enable fluid mode system wide on the active web profile.
- Optionally, enable fluid mode for desktop computers on the active web profile.
- Access the system using a fluid compatible browser.

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

For more information on fluid compatible browsers, see the certifications for PeopleTools 8.54 on [My Oracle Support](#).

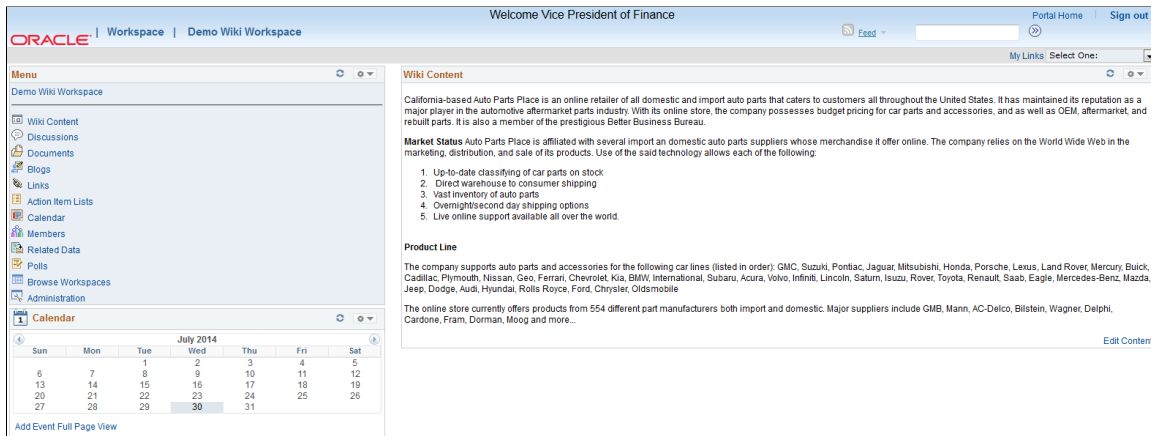
PAPPBR_THEME_CW_TANGERINE Theme

The PAPPBR_THEME_CW_TANGERINE theme is the branding theme for collaborative workspaces that is compatible with the Tangerine (PT8.53 default) theme style family. The

PAPPBR_THEME_CW_TANGERINE theme presents a workspace header similar to the default workspace theme available in PeopleSoft Interaction Hub 9.1 Revision 2.

Image: Workspace homepage using the PAPPBR_THEME_CW_TANGERINE theme

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

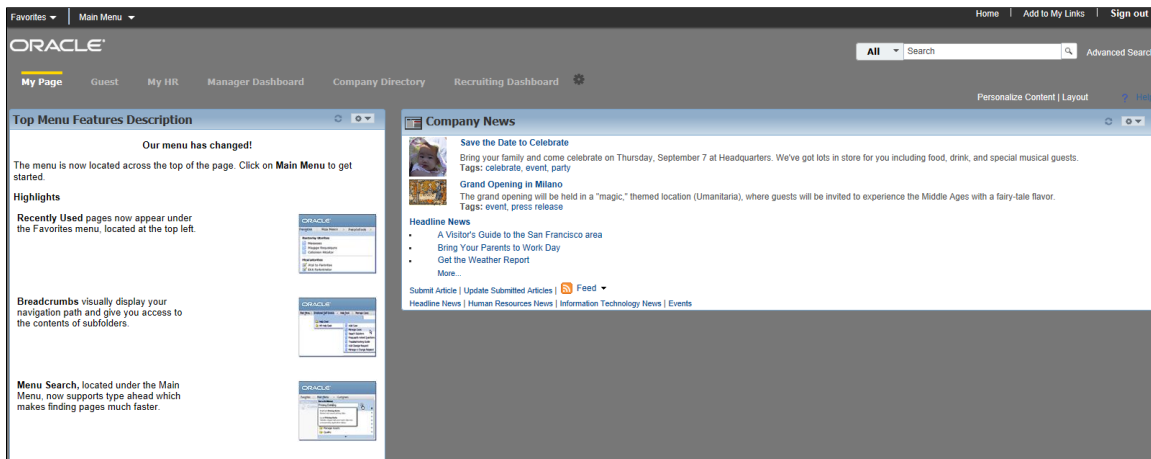


PAPPBR_THEME_OOWDEMO Theme

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

Image: Portal homepage using the PAPPBR_THEME_OOWDEMO theme

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



Theme Assignments

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

Image: Assign Branding Themes page for the EMPLOYEE portal

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

Assign Branding Themes

Select registry specific branding options and defaults. These values will override the system default options.

Portal Name: EMPLOYEE

Assign Registry Themes

*Effective Date: 01/01/1900

*Description: Tangerine Theme

*Default Theme: PAPPBR_THEME_TANGERINE (Default Theme - Tangerine)

Default Skin: [Dropdown]

Custom Tabs: PAPP_CUSTOM_TABS (Custom Tabs)

Default Custom Tab: [Dropdown]

Default Fluid Homepage: [Dropdown]

Owner ID: CPA (Interaction Hub)

Assign User Attribute Themes

Assign a different theme by user attribute. When a user has two or more listed attributes, the theme with the lower priority number applies. When a user has none of the listed attributes, the registry default theme applies. You may bypass user attribute based

User Attribute Based Theme Assignments

*Priority #	*Attribute Type	*Attribute Value	*Theme Name	Skin	Custom Tabs
1	2	Role	PAPP_SYSTEM_ADMIN	PAPPBR_THEME_TANGERINE	PAPP_CUSTOM_TABS
2	200	Role	PAPP_GUEST	PAPPBR_THEME_TANGERINE	Guest Skin

Branding System Elements

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

Name	Description
ADD_TO_MY_LINKS_LINK	Used to include the Add to My Links link in a header definition. Important! This element also requires the inclusion of the ADD_TO_MY_LINKS_WIDGET element.
ADD_TO_MY_LINKS_WIDGET	Used to include JavaScript code to support My Links functionality. This JavaScript also supports the Add to My Links link and the My Links drop-down menu, which can independently be added to a header definition.

Name	Description
MY_LINKS_DROPDOWN_MENU	<p>Used to include the My Links drop-down menu in a header definition.</p> <p>Because My Links functionality is included in the Favorites menu, delivered portal header definitions do not include this element. However, since a workspace does not provide access to the Favorites menu, the delivered workspace header definition includes this element.</p> <hr/> <p>Important! This element also requires the inclusion of the ADD_TO_MY_LINKS_WIDGET element.</p> <hr/>
WS_GREETING	Used to include the workspace greeting in a workspace header definition.
WS_PORTAL_HOME	Used to include the Portal Home link, which returns to the user to the default portal homepage, in a workspace header definition.
WS_RELATED_FEEDS_WIDGET	Used to include the Feed widget in a workspace header definition.
WS_SEARCH_BOX_WIDGET	Used to include the Search widget in a workspace header definition.
WS_TITLE	Used to include the workspace title in a workspace header definition.

Branding User Attributes

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

SITE_BASED User Attribute

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

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

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

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

Custom Tabs Navigation Collection

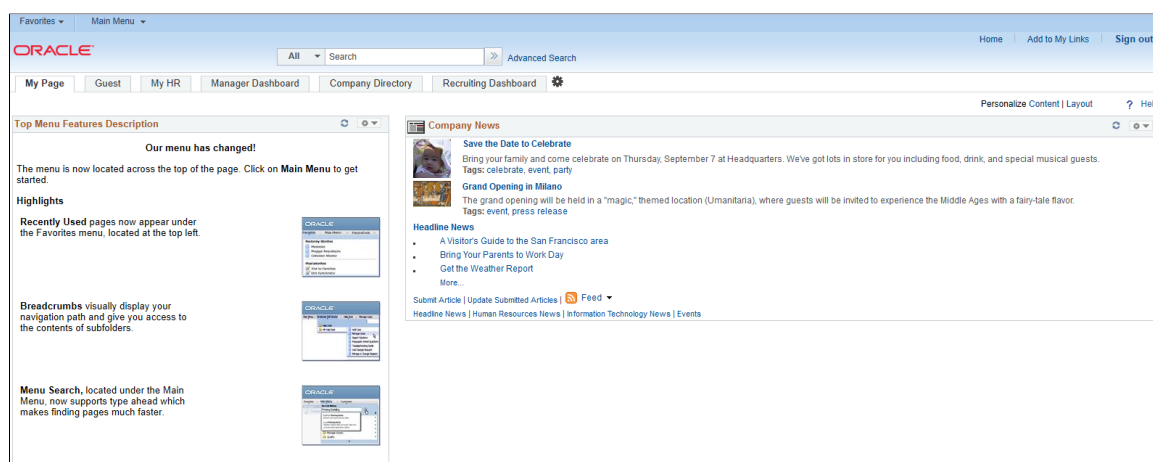
PeopleSoft Interaction Hub delivers the Custom Tabs (PAPP_CUSTOM_TAB) navigation collection, which provides examples of how to link to remote content in a *custom tabs navigation collection*. This navigation collection allows you to use links to local or remote content references that are then rendered as homepage tabs. For more information on a custom tabs navigation collection, see *PeopleTools*:

Portal Technology, “Using PeopleTools Branding Features,” Additional Branding Tasks, Understanding Navigation Collections Used to Create Custom Homepage Tabs.

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

Image: Portal homepage displaying multiple custom homepage tabs

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



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

Administering Branding in PeopleSoft Interaction Hub

Understanding Branding Administration

In PeopleSoft Interaction Hub, branding administration tasks include:

- Enabling or disabling the PeopleSoft Interaction Hub Revision 3 branding feature—that is, enabling or disabling the PeopleTools branding framework.
- Using the Branding WorkCenter to:
 - Identify branding system settings for all systems in the cluster.
 - Manage branding features and definitions in the local PeopleSoft Interaction Hub system.
 - Manage selected settings on each remote system in the cluster.
 - Publish fluid component theme style sheet mappings to all remote systems in the cluster.

Enabling the Revision 3 Branding Features

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

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

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

1. Select Portal Administration, System Data, Installation Options.
2. Select the Features page.
3. Select the Enabled check box for the Revision 3 row.
4. Click Save.

Related Links

"Features Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

Using the Branding WorkCenter

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

Pages Used in the Branding WorkCenter

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

Prerequisites to Managing Branding Across a Cluster of PeopleSoft Applications

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

While you can use other methodologies to integrate multiple PeopleSoft applications so that you can manage branding from the PeopleSoft Interaction Hub system, the simplest and most complete methodology is to use unified navigation to federate the systems. For more information, see "Understanding Unified Navigation" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

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

Understanding the Branding WorkCenter

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

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

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

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

- WorkCenter-specific pages to:
 - Identify branding system settings for all *live* systems in the cluster.
 - Publish fluid component theme style sheet mappings to all remote systems in the cluster.

Image: Branding WorkCenter (with three systems live)

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

The screenshot displays the Branding WorkCenter interface. On the left, a sidebar lists several branding management tasks: Define Headers and Footers, Assemble Themes, Assign Themes, System Options, Component Branding, Pagelet Branding, and System Definitions. The main area is titled 'Branding System Options' and shows a table of 'Branding Node Network' information. The table lists three live systems: E92DP343 (Financials/Supply Chain), H21DP343 (Human Capital Management), and P91DP343 (PS PA - Local Node). Each system entry includes its description, theme style type, and links to system style sheets for Classic and Fluid themes.

Node Name	Description	Theme Style Type	System Style Sheet for Classic	System Style Sheet for Fluid
1 E92DP343	Financials/Supply Chain	Tangerine (PT8.53 default)	PSTYLEDEF_TANGERINE	
2 H21DP343	Human Capital Management	Tangerine (PT8.53 default)	PSTYLEDEF_TANGERINE	
3 P91DP343	PS PA - Local Node	Tangerine (PT8.53 default)	PSTYLEDEF_TANGERINE	

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

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

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

Image: A remote Branding Systems Options page within the Branding WorkCenter

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

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

The screenshot shows the 'Branding System Options' page for the HRMS system. The left sidebar contains a 'Branding' menu with 'System Options' and 'System Options (HRMS)'. The main content area has a title 'Branding System Options' and a subtitle 'Branding System Options for the Human Capital Management (HCM) content provider.' The page includes several sections: 'Classic Components' with a 'Theme Style Type' dropdown set to 'Tangerine (PT8.53 default)' and a 'Default Style Sheet Name' field set to 'PSSTYLEDEF_TANGERINE'; 'Additional Style Sheet Objects' with a grid for selecting style sheets; 'Additional JavaScript Objects' with a grid for selecting JavaScript files; 'Fluid Components' with a 'Default Style Sheet Name' field; and 'PeopleTools Options' at the bottom. A 'Save' button is located at the bottom right.

Image: Branding WorkCenter (with one system offline)

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

The screenshot shows the 'Branding System Options' page for the HRMS system, displaying a table of branding system options for multiple nodes in the cluster. The table has columns for 'Node Name', 'Description', 'Theme Style Type', 'System Style Sheet for Classic', and 'System Style Sheet for Fluid'. The table lists three nodes: 1 H21DP343 (Human Capital Management), 2 E92DP343 (Financials/Supply Chain), and 3 PS1DP343 (PS PA - Local Node). The 'System Style Sheet for Classic' column shows 'PSSTYLEDEF_TANGERINE' for all nodes, and the 'System Style Sheet for Fluid' column is empty.

Node Name	Description	Theme Style Type	System Style Sheet for Classic	System Style Sheet for Fluid
1 H21DP343	Human Capital Management	Tangerine (PT8.53 default)	PSSTYLEDEF_TANGERINE	
2 E92DP343	Financials/Supply Chain	Tangerine (PT8.53 default)	PSSTYLEDEF_TANGERINE	
3 PS1DP343	PS PA - Local Node	Tangerine (PT8.53 default)	PSSTYLEDEF_TANGERINE	

System Options Page

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

Navigation

Portal Administration, Branding WorkCenter

Image: System Options page

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

System Options

Themes

Branding System Options

View branding system options of all nodes in the cluster.

Branding Node Network

Personalize | Find | First 1-3 of 3 Last

Node Name	Description	Theme Style Type	System Style Sheet for Classic	System Style Sheet for Fluid
1 L21DAP08	Enterprise Learning Management	Tangerine (PT8.53 default)	PSSTYLEDEF_TANGERINE	
2 H21DAP08	Human Capital Management	Tangerine (PT8.53 default)	PSSTYLEDEF_TANGERINE	
3 P91DAP08	PS PA - Local Node	Tangerine (PT8.53 default)	PSSTYLEDEF_TANGERINE	

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

Themes Page

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

Navigation

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

Image: Themes page

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

Theme Template Definitions

Publish fluid component theme style sheet mappings of the selected theme template definitions to all nodes in the cluster, or create ADS project for the selected theme template definitions.

Keywords

Select	Theme ID	Description
<input type="checkbox"/>	PAPPBR_THEME_CW_TANGERINE	Default CW theme - Tangerine
<input type="checkbox"/>	PAPPBR_THEME_TANGERINE	Default Theme - Tangerine
<input type="checkbox"/>	PAPPBR_THEME_TANGERINE_ALT	Default Theme - Tangerine ALT
<input type="checkbox"/>	PAPPBR_THEME_OOWDEMO	OOW Demo theme
<input type="checkbox"/>	DEFAULT_THEME_CLASSIC	Default Theme - Classic
<input type="checkbox"/>	DEFAULT_THEME_SWAN	Default Theme - Swan
<input type="checkbox"/>	DEFAULT_THEME_TANGERINE	Default Theme - Tangerine
<input type="checkbox"/>	DEFAULT_THEME_TANGERINE_ALT	Default Theme - Tangerine Alt

☒ Select All ☐ Clear All

Keywords

Enter keyword text to search against the theme ID, label, and description.

Search

Click the Search button to perform the search. If no keyword values are entered, then all theme definitions in the current system are displayed.

Select

Select this check box to select one or more theme definitions to be published or to be included in the Data Migration Workbench project.

Select All

Click this button to select all theme definitions.

Clear All

Click this button to deselect all theme definitions.

Publish Fluid Theme Style Sheet Mappings

Click this button to publish fluid style sheet mapping pairs for the selected theme definitions. See “Publishing Fluid Style Sheet Mappings” for more information.

Create Data Migration Project

Click this button to create a Data Migration Workbench project that includes the selected theme definitions. See “Creating a Data Migration Project” for more information.

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

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

- Publishing selected fluid component theme style sheet mapping pairs to the remote systems.
- By creating a Data Migration Workbench project for the selected themes.

Publishing Fluid Style Sheet Mappings

To publish fluid style sheet mappings:

1. In the PeopleSoft Interaction Hub system, generate theme style sheet stubs for fluid components from the original base style sheets on the Generate Theme Style Sheets page. See *PeopleTools: Portal Technology*, “Using PeopleTools Branding Features,” Additional Branding Tasks, Generate Theme Style Sheets for Fluid Components for more information.
2. In the PeopleSoft Interaction Hub system, register a base style sheet and theme style sheet pair for a specific node on the Assemble Themes page. See *PeopleTools: Portal Technology*, “Using PeopleTools Branding Features,” Administering System Branding, Assembling Branding Themes for more information.
3. Access the Themes page in the Branding WorkCenter.
4. Select one or more branding theme definitions from the PeopleSoft Interaction Hub system.
5. Click the Publish Fluid Theme Style Sheet Mappings button.

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

Creating a Data Migration Project

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

Image: Create Data Migration Project page

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

Create Data Migration Project

[Help](#)

Specify properties of the data migration project, and the data to be included in the project.

*Project Name

*Description

Comments

☒ Include Headers and Footers

☐ Include System Objects

☐ Include Theme Style Sheets

Project Name	Enter a name for the data migration project.
Description	Enter a description for the data migration project.
Comments	Enter any additional comments that will appear with the project in Data Migration Workbench.
Include Headers and Footers	Select this check box to add the header and footer definitions used by the selected theme definitions into the project.
Include System Objects	Select this check box to add the image objects, HTML objects, style sheet objects, URL objects, and message catalog objects used by the header or footer definitions of the selected theme definitions into the project.
Note: This check box is displayed only when the Include Headers and Footers check box is selected.	
Include Theme Style Sheets	Select this check box to add the theme style sheets of the selected theme definitions into the project, which include the theme style sheets and skin style sheets for classic style sheets as well as mapped theme style sheets and global override style sheets for fluid components. Also included are the parent style

sheets or children style sheets of those style sheet objects, when applicable, as well as images used by them.

For more information on creating Data Migration Workbench projects, see *PeopleTools: Data Migration Workbench*, “Using Data Migration Workbench,” Defining Data Migration Project.

