# CanIt Branding Guide for Version 9.2.10 Roaring Penguin Software Inc.

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## 1 Introduction

CanIt has a facility called *branding* that lets you alter the look and feel of the web-based interface. You can brand CanIt to look like the rest of your web site, and make it fit seamlessly into the site. Generally, you can create your branding so that it survives CanIt upgrades.

## 1.1 Target Audience

CanIt's web interface is written in PHP. Before you tackle a branding project, you should:

- Be very familiar with HTML.
- Have experience programming in PHP.

# 2 File Layout

All of CanIt's PHP files live under a single directory. On CanIt appliances, this directory is /var/www/canit. On Red Hat machines, it's likely to be /var/www/html/canit. In this manual, we will refer to the directory containing the files as web\_root.

The files are laid out as follows:

- .php files directly under **web\_root** are small stubs that serve the actual CanIt web pages.
- web\_root/classes object definitions for various CanIt objects such as users, domain rules, custom rules, etc.
- web\_root/images static GIF, PNG and JPEG image files.
- web\_root/js various JavaScript files.
- web\_root/manual online HTML versions of the manuals.
- web\_root/pages the actual implementation of CanIt web pages.
- web\_root/site a directory for placing site-specific configuration files.
- **web\_root/themes** a directory of *theme* subdirectories. A theme specifies the branding (or "look-and-feel") of CanIt.
- web\_root/themes/langs language files for translating the CanIt web interface into another language.

As you customize the look of CanIt, you'll work mostly in the **site** and **themes** subdirectories of **web\_root**. But you may occasionally need to look at files in the other directories.

# 3 Configuration Files

When CanIt starts up, it reads the following configuration files, in order:

1. web\_root/config.php

- 2. web\_root/config-pro.php
- 3. web\_root/config-domain-pro.php (CanIt-Domain-PRO only.)
- 4. web\_root/config-appliance.php (CanIt appliances only.)
- 5. web\_root/site/config.php (if it exists.)
- 6. **web\_root/site/hostname/config.php** where *hostname* is the server name sent by the Web browser.

CanIt then loads the appropriate language file.

Next, CanIt looks for additional configuration files as follows:

- 1. If the directory **web\_root/config.d** exists, then CanIt reads each file in that directory whose name matches **\*.php**. The files are read in the same sorted order as output by **1s**.
- 2. If the directory **web\_root/site/config.d** exists, then CanIt reads all the **\*.php** files in that directory in sorted order.

# 4 Creating a Theme

To create a theme, you need to create a subdirectory under **web\_root/themes** containing your theme files. If your directory is named **web\_root/themes/theme\_name**, then we refer to **theme\_name** as the **name** of your theme.

## 4.1 theme\_info.php

The theme subdirectory must contain a file called **theme\_info.php**. The file must define a function called **theme\_name\_config** that takes no arguments and returns an array. Here is an example from the **modern** theme:

```
<?php
function modern_config() {
    return array(
        'name' => 'Modern',
        'menu_location' => L("to the left"),
        'page_template' => 'page_template.php',
        'login_template' => '',
        'simple_template' => '',
        'files' => 'themes/modern'
        );
}
?>
```

The array returned by the **theme\_name\_config** function is called the *Configuration Array*. The Configuration Array can contain the following keys. Keys that must be present are marked "required".

- name (required). The name of the theme as it should be displayed in the Web interface. Note that the internal name is simply the name of the subdirectory under themes/, but the display name can be whatever you like.
- menu\_location (required). The location of the main menu relative to the page content. It should be something like "above" or "to the left", and should be wrapped in a call to the L () function so that it can be localized.
- page\_template (required). The file name of the actual page template. This template is used to render interior pages. The file name is interpreted within the theme directory.
- login\_template (optional). The file name of a template that renders the login page. If you do not supply a name (or supply the empty string), the default web\_root/themes/common\_login.php template is used.
- **simple\_template** (optional). The file name of a template that renders the "simplified" interface. If you do not supply a name (or supply the empty string), the default **web\_root/themes/common\_simple\_gui.php** template is used.
- **files** (required). The name of a directory (relative to **web\_root**) in which to search for files (image files, CSS files, etc.) This will be discussed in depth in Section 5.24. Note that you should *always* use a relative rather than absolute directory for **files**.

• page\_template\_dir (optional). The name of a directory within the theme directory (it must be a relative path.) If you supply this key, then you can use different templates on a per-page basis. For example, the page rules.php will use the template rules.php within the page\_template\_dir if it exists and is readable. Otherwise, the standard page\_template is used.

## 4.2 The Page Template

The file named by the **page\_template** key in the Configuration Array is the template used for rendering most CanIt pages. It is simply an HTML file with some embedded PHP calls.

The page template is invoked with a variable called **\$t** bound to an object called *the T*. Your template should *only ever call methods on the T*. You should *not* be tempted to look at the innards of the CanIt PHP code and make calls to other CanIt functions. Treat the CanIt PHP code as opaque.

Take a look at the modern/page\_template.php and postmodern/page\_template.php files for examples of how templates are laid out.

## 5 T Methods

The T has the following public methods. You should only call these methods; *do not* access internal T data structures or private methods.

## 5.1 head\_title()

Calling **\$t->head\_title()** produces HTML code suitable for insertion within the TITLE tags. Here's how you might use it in a template:

```
<html>
<head>
    <title><?php print $t->head_title(); ?></title>
```

# 5.2 head\_content()

Call **\$t->head\_content()** just before you close the HEAD tag. For example:

```
<?php print $t->head_content(); ?>
</head>
```

# 5.3 bodytag

You should not start your body with an explicit BODY tag. Instead, use \$t->bodytag(). You need to call this method because CanIt sometimes adds some attributes to the body tag. Example:

```
<?php print $t->bodytag(); ?>
<!-- Above line emits a <BODY> tag -->
```

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## 5.4 logged\_in\_as

This method returns the name of the logged-in user. Special HTML characters are replaced with HTML entities. If there is no logged in user, then the blank string (") is returned. Example:

```
You are logged in as: <b><?php print $t->logged_in_as(); ?>
```

# 5.5 streamname()

This method returns the name of the current stream. Special characters are replaced with HTML entities. Example:

```
Viewing stream: <?php print $t->streamname(); ?>
```

# 5.6 streaminfo()

This method returns information about the current stream, including showing stream inheritance. Special characters are replaced with HTML entities. Example:

```
Stream Details: <?php print $t->streaminfo(); ?>
```

# 5.7 stream\_switch\_form()

This method returns HTML code for producing the "Switch Stream" form. In CanIt-Domain-PRO, it also renders the Switch Realm form (if the user has access to other realms. Usage is very simple:

```
<?php print $t->stream_switch_form(); ?>
```

#### 5.8 quicklink\_menu

This method returns HTML code for producing the "quick links" menu. If there are no quick links, the empty string is returned. The resulting HTML code looks something like this:

```
<!i>...
class="active">...
<!i>...
```

That is, the quick links menu is an unordered list of class **quicklink menu**. Each link is an LI element. The active element has the class **active**. Here's a usage example. Note that we don't create a table row if there are no quick links.

```
<?php $ql = $t->quicklink_menu();
    if ($ql != '') {
        print("$ql\n");
    }
?>
```

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#### 5.9 menu

The **menu** method is the most complex of the T methods. It can be invoked in three different ways:

- 1. Calling \$t->menu() yields HTML code representing the navigation menus as nested UL elements.
- 2. Calling \$t->menu(n) yields HTML code representing just the nth menu from the top as a single UL element. \$t->menu(0) returns the top-level menu, \$t->menu(1) returns the second-level menu, and so on. (Currently, CanIt has at most three levels of menu.) If the menu with the specified level does not exist, the empty string is returned.
- 3. Calling \$t->menu (n, m) yields HTML code for menus n through m as nested UL elements. Thus, \$t->menu (0, 1) returns the top-level and second-level menus as nested UL elements, but ignores the third-level menu.

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The results of calls to **menu** look something like this:

```
<!-- Output of $t->menu() -->
...
...
 ...
 <!-- Output of $t->menu(1) -->
...
<!-- Output of $t->menu(0,1) -->
...
...
```

Each menu is an UL element; it has the class **menu***N*, where *N* is 1 for the top-level menu, 2 for the second-level menu and so on. Within a menu, each entry is an LI element, with the active menu entry having class **active**.

# 5.10 helpbox

The \$t->helpbox() method returns HTML code for the online help and online documentation links. Usage is simple:

```
<?php print $t->helpbox(); ?>
```

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#### 5.11 language

The \$t->language() method returns the language code currently in use. It is all lower-case and consists of an IETF language tag. Typical tags are en-us, en, pt, fr, de and es, denoting US English, English, Portuguese, French, German and Spanish, respectively.

#### **5.12** title

The \$t->title() method returns the page title suitable for use within the document body. For example:

```
<h1><?php print $t->title(); ?></h1>
```

## 5.13 **body**

The \$t->body() method returns most of the actual page content. Very simply, where you want all the page content to appear, use:

```
<?php print $t->body(); ?>
```

## 5.14 guide\_links

The method **\$t->guide\_links** returns a UL element of class **guides** containing the links to online documentation and the "Technical Support" link. Each link is an LI element. Where you want the links to appear, use:

```
<?php print $t->guide_links(); ?>
```

#### 5.15 quicklink\_form

This method returns HTML code for implementing the "Add to Quick Links" form. The FORM element has class **quicklink-form**. Use this code where you want the form to appear:

```
<?php print $t->quicklink_form(); ?>
```

#### 5.16 powered\_by\_with\_version

This method returns HTML code for printing the "Powered by CanIt" link, typically in the page footer. Note that *you may not remove this link*. All of your page templates *must* include it somewhere. Usage:

```
<?php print $t->powered_by_with_version(); ?>
```

## 5.17 powered\_by\_no\_version

This is similar to **powered\_by\_with\_version**, but does not include the product version number. Typically, this is used on the login page since we may not wish to advertise the version number to non-authenticated users. Usage:

```
<?php print $t->powered_by_no_version(); ?>
```

#### 5.18 theme\_selection\_menu

If you wish to allow users to switch themes on the fly, include a call to this method somewhere in your template. It produces HTML code to create a pulldown selection widget for switching themes. Usage:

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```
<?php print $t->theme_selection_menu(); ?>
```

## 5.19 is\_guest

The method \$t->is\_guest() returns true if the user is not authenticated (for example, if you have enabled unauthenticated voting and the user clicks a voting link, or a user releases a message by following a link in a notification email message.)

#### 5.20 is root

The method **\$t->is\_root()** returns true if the user has "root" access. In CanIt-Domain-PRO, this means that the user is either the site administrator or a realm administrator.

#### 5.21 is\_super\_root

The method \$t->is\_super\_root() returns true if the user is the site administrator. In CanIt-Domain-PRO, this means that the user has "root" access in the **base** realm.

#### 5.22 product\_name

The method \$t->product\_name() returns the product name (CanIt-PRO or CanIt-Domain-PRO).

#### 5.23 product\_version

The method \$t->product\_version() returns the product version number.

#### 5.24 find file

The method \$t->find\_file ("filename") searches for a file in a specified set of directories and returns the *first* one found. If the file is not found at all, returns "filename" unchanged.

Suppose the CanIt URL is: http://server.example.org/dir/index.php and that your theme's file attribute is themes/mytheme. Then the file filename is looked for in the following locations under web\_root:

- 1. themes/site/themes/mytheme/server.example.org/dir/filename
- 2. themes/site/themes/mytheme/dir/filename
- 3. themes/site/themes/mytheme/server.example.org/filename
- 4. themes/site/themes/mytheme/filename
- 5. themes/site/files/server.example.org/dir/filename

- 6. themes/site/files/dir/filename
- 7. themes/site/files/server.example.org/filename
- 8. themes/site/files/filename
- 9. themes/mytheme/server.example.org/dir/filename
- 10. themes/mytheme/dir/filename
- 11. themes/mytheme/server.example.org/filename
- 12. themes/mytheme/filename
- 13. themes/files/server.example.org/dir/filename
- 14. themes/files/dir/filename
- 15. themes/files/server.example.org/filename
- 16. themes/files/filename

If you make use of this function in your templates, you can allow simple customizations such as changing a logo or a CSS file based on the server host name or path (which you can make with a symbolic link.)

That is, rather than hard-coding:

```
<img src="themes/mytheme/some_image_file.gif">
```

You should use:

```
<img src="<?php print $t->find_file("some_image_file.gif"); ?>">
```

#### 6 Advanced T Methods

The methods in this section are for the more adventurous. We *do not* recommend using them unless you are very comfortable with programming in PHP.

#### 6.1 menu\_items

The method  $t->menu_items(n)$  returns all entries in menu n as a PHP array. Each returned element is an array with the following keys:

- **key** a unique identifier within this menu.
- **url** the URL to link to.
- **title** the suggested value for the "title" attribute.
- **text** the text of the menu item.
- active true if the menu item is currently active; false otherwise.

6.2 menupath

## 6.2 menupath

The method **\$t->menupath()** returns an array consisting of the path to the current page. Each entry corresponds to the **key** hash in a menu (see **menu\_items** above.) The first entry of the array corresponds to the key in menu 0, the next to the key in menu 1, and so on.

#### 6.3 stash

Page authors can "stash" various bits of information on a page. The method **\$t->stash(key)** returns the stashed item associated with *key*. If there is no such stash item, then the empty string is returned.

#### 7 Menus

CanIt allows you to customize the menus (to add new pages, for example.)

Adding pages to CanIt requires intimate knowledge of the inner workings of the PHP code. The internals can change from release to release; Roaring Penguin cannot offer support for custom pages or custom menu entries.

#### 7.1 URL Keys

CanIt stores *URL Keys* in the menu structure rather than actual URLs. This allows you to change where a menu entry points simply by changing the URL key.

All URLs in the menu system are specified as relative URLs. For example, use rules.php and not /canit/rules.php or http://server.example.com/canit/rules.php.

In general, we recommend that a URL of **somepath.php** be given a URL key of **somepath**. The internal CanIt code follows this convention everywhere.

To set up your URL keys, create a configuration file (we recommend **site/config.d/10\_url\_keys.php**) with contents similar to the following:

```
<?php
global $Config;
$Config['URL:somepath'] = 'somepath.php';
$Config['URL:another'] = 'another.php';
?>
```

For a URL of **something.php**, use a URL key of **something** and make an assignment to \$Config['URL:something'].

#### 7.2 Menu Items

A menu entry is represented as a PHP array. The array has the following elements:

- **text** The text to display for the menu item.
- **key** An identifier for the menu item. The key must be unique for all menu items at a given level.
- after This element is optional. If supplied, it names the key of the menu entry after which to place this menu entry. If after is set to the special value \*FIRST\*, then the menu entry is placed at the very beginning of the menu. If after is not set, then the menu entry is placed at the very end of the menu.

- url This is the URL Key of the page to go to when the menu entry is clicked.
- **permissionlist** An array of permission names. If the current user has *any* permission in the list, access to the entry will be granted. Otherwise, the menu entry will not be shown. Consult the PHP source code for a list of permissions.
- type A string or an array of strings. The possible string values are:
  - only\_root Only show the menu entry to site administrators (and in CanIt-Domain-PRO, realm administrators.)
  - only\_super\_root Only show the menu entry to site administrators.
  - has\_subrealms (CanIt-Domain-PRO only). Only show the menu entry to realm administrators who have sub-realms.
  - **sub** Only show the menu entry if at least one sub-item would be accessible to the user.
  - func: some\_name Call the global function menu\_callback\_some\_name and only show the
    menu entry if it returns a true value.

If an array of strings is provided for **type**, then the menu entry is shown only if *all* string tests pass.

- **feature\_required** If supplied, this is the name of a "Feature" that must be enabled for the menu entry to be shown. Consult the PHP source code for a list of feature names.
- **title** This is the text to put in the "title=XXX" attribute of the <a> tag.
- **disabled** If supplied and given a true value, the menu entry will not be shown.

# 7.3 Manipulating Menu Entries

Menu entries can only be added when a configuration file is read. By the time the page template is invoked to render content, it is too late to add menu items (although existing items can be disabled prior to rendering the menu.) For this reason, you should place code that creates menu items in a site configuration file. site/config.2/20\_menu\_items.php is a reasonable place.

A global variable called \$CANIT\_MENU holds the menu structure. This object has the following public methods:

#### 7.3.1 Adding a Top-Level Menu Item

To add a top-level menu item, call  $CANIT_MENU->add(Shash)$  where Shash is an array as described in Section 7.2. Here is an example:

The example code above assumes that Config['URL:mypage'] has been set appropriately. Note that English messages are wrapped in a call to the global function L like this: L(''Some-Message''). These messages can be localized for the user's selected language.

#### 7.3.2 Adding a Lower-Level Menu Item

To add a lower-level menu item, call \$CANIT\_MENU->add\_under(\$path, \$hash) where \$path\$ is an array of keys starting from the top-level entry and continuing down, and \$hash\$ is an array as described in Section 7.2. Here is an example:

Assuming that the top-level "Rules" menu has a key of rules, this adds a menu entry under that menu. If the rules menu has a menu entry with a key of domains, then the new entry is placed immediately after that entry.

#### 7.3.3 Disabling a Menu Item

To disable a menu item, call \$CANIT\_MENU->disable(\$path) where \$path\$ is an array of keys starting from the top-level entry and continuing down to the desired menu item. Here are some examples:

```
<?php
global $CANIT_MENU;
# Disable Rules : Networks
$CANIT_MENU->disable(array('rules', 'networks'));
# Disable the entire Preferences menu
$CANIT_MENU->disable(array('prefs'));
?>
```

You can also disable a menu from within your page template by calling the method  $t-\infty (\$path)$ 

# 8 Localizing Messages

To translate messages from English into the user's selected language, create or edit a file called **site/langs/code.php** where *code* is the language code (lower-case) such as "fr" or "it" for French and Italian, respectively.

The language file simply assigns translations to the global \$CANIT\_MSG associative array. For example, your language file might look like this:

```
<?php
global $CANIT_MSG;
$CANIT_MSG["Welcome"] = "Bienvenue";
$CANIT_MSG["Waiter, some water, please!"] =
    "Gar&ccedil;on, un peu d'eau, s'il vous pla&icirc;t!";
?>
```

Notice that the translated messages use HTML entities such as ç and î rather than ç or î directly. You should *always* use HTML entities and *never* use ISO-8859-1 or UTF8-encoded source files.

# 9 Setting the Default Theme

Normally, CanIt uses the **postmodern** theme as its default theme. To change this, edit **web\_root/site/config.php** and set:

```
$Config['Theme:Name'] = 'theme_name';
```

Replace theme\_name with the name of your theme.

# 10 Restricting Access to Themes

By default, CanIt's theme-switching pulldown allows access to all themes in the **themes** subdirectory. You can explicitly list the themes that should be allowed as follows in **web\_root/site/config.php**:

```
$Config['Themes:permitted'] = array('modern', 'postmodern');
```

If you set **\$Config['Themes:permitted']**, it should be set to an *array* of allowed theme names.

If you want to allow access to all themes except for some, you can use:

```
$Config['Themes:denied'] = array('modern');
```

Set \$Config['Themes:denied'] to an *array* of denied theme names. Note that Themes:permitted overrides Themes:denied. If it is set, then Themes:denied is ignored.

# 11 Making Themes Customizable

CanIt supports *customizable themes*. These are themes in which the base appearance is specified by the theme, but which permit users to change various aspects of the appearance (such as colors and logos) via the CanIt Web interface.

Creating a customizable theme is not much harder than creating a non-customizable theme. We recommend creating the non-customizable theme first and then modifying it to be customizable.

## 11.1 Adjusting theme\_info.php

To make a theme customizable, you need to add a customizable\_properties member to the Configuration Array. This member is an hash of name/value pairs, each of whose keys is any name you choose (except for **css**, which is reserved) and each of whose values is a hash describing the customizable element.

A customizable element can have one of three types:

- 1. image-type properties allow users to upload custom logos.
- 2. color-type properties allow users to set colors of various page elements.
- 3. text-type properties allow users to customize various snippets of text.
- 4. css-type properties allow users to add arbitrary CSS code to the stylesheet. User-supplied CSS always comes last when CanIt generates the dynamic CSS.

You should have at most one css-type property.

#### 11.1.1 Custom Images

A customizable image property must contain the following hash elements in its value:

- desc a human-readable description of the element.
- type the value of this key must be image.
- limits a four-element hash with elements min\_width, min\_height, max\_width and max\_height specifying the minimum and maximum permissible image dimensions.
- default a file name (*not* a path name) which is passed to **\$t->find\_file()** to load a static image if the user has not uploaded a custom image.

#### 11.1.2 Custom Colors

A customizable color property must contain the following hash elements in its value:

- desc a human-readable description of the element.
- type the value of this key must be color.
- $\bullet$  default the default color of the HTML element(s).
- css the CSS that should be emitted to customize the appearance of the elements. Within the CSS string, use **%s** to substitute the color value.

#### 11.1.3 Custom Text Fragments

- desc a human-readable description of the element.
- type the value of this key must be text.
- default the default text if the user does not supply a customized version.

Note that in addition to the hash members described above, any element may optionally contain a base\_only key. If this is set to true, then in CanIt-Domain-PRO, the element will be customizable only in the base realm. Use this (for example) for elements that appear on the login page: Before anyone has logged in, the system is implicitly in the base realm and only customizations created in the base realm can apply.

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#### 11.1.4 Custom CSS Code

A css property must contain the following hash elements in its value:

- desc a human-readable description of the element.
- type the value of this key must be css.
- default must be set to the empty string.
- css must be set to the empty string.

# 11.2 An Example

Here is a small example of a **theme\_info.php** file with customizable theme properties:

```
function example_config() {
 return array(
    'name' => 'Example',
    'files' => 'themes/example',
    'customizable_properties' => array(
      'logo' => array('desc' => L("Logo"),
                      'type' => 'image',
                      'limits' => array('min_width' =>50, 'max_width'=>160,
                                         'min_height'=>50, 'max_height'=>160),
                      'default' => 'logo_example.png'),
      'header_bg' => array('desc' => L("Background color of top bar"),
                            'type' => 'color',
                            'default' => '#3399ff',
                            'css' => "#header { background-color: %s;}\n")
        ));
?>
```

In this example, there are two customizable elements: logo and header\_bg. Let's examine them:

- logo is of type image and allows the user to upload an image ranging in size from  $50 \times 50$  to  $160 \times 160$  pixels. The description on the customization page reads "Logo" and if the user does not upload an image, the default logo\_example.png image will be used.
- header\_bg is of type color. If the user specifies a non-default color, then the CSS code: #header { background-color: color; } will be emitted.

# 11.3 Making the Templates Customizable

To make your theme templates customizable, you simply need to perform the following steps:

1. Make sure that you specify colors *only* in CSS files. Make sure that the **customizable\_properties** array specifies the correct CSS fragments to override your colors. CanIt will automatically generate a CSS file that comes last (after all your theme's CSS files) to override colors based on user customization.

2. When you wish to display an image, use the **\$t->custom\_property** method to obtain the image. In the example above, the logo image corresponds to a property called **logo**, so your template might look like this:

```
<?php
    $logo = $t->custom_property("logo");
    print "<img src=\"$logo\" alt=\"Logo\">";
?>
```

The \$t->custom\_property("logo") call generates the correct filename for the image—it will use the default logo\_example.png image if the theme has not been customized, or a dynamically-generated image if it has.

Similarly, within your theme, use \$t->custom\_property(key) to obtain custom text values. Note that CanIt returns whatever text the user has entered. Depending on your theme, you may wish to escape the returned text with htmlspecialchars to avoid cross-site scripting attacks.

# 12 Advanced Theming: Views

A given theme may support multiple *views*. By default, CanIt supports two views: **standard** and **mobile**. If a theme supports a **mobile** view, then CanIt automatically uses it if it detects that the browser window's width or height is 400 pixels or less.

To indicate that your theme supports multiple views, add an element to the Configuration Array called **views**. It should be an array of supported views. For example:

```
<?php
function example_config() {
  return array(
    'name' => 'Example',
    /* ... */
    'views' => array('standard', 'mobile'),
    /* ... */
  );
}
```

Next, the following keys can have array values rather than being simple scalars. The keys of the arrays should be view names:

- login\_template
- menu\_location
- page\_template\_dir
- page\_template
- simple\_template

Here's an example:

The final step is to create the templates and CSS files appropriate to each view.