TIBCO Spotfire® Cobranding

Software Release 10.4

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Contents

TIBCO Documentation and Support Services

How to Access TIBCO Documentation

Documentation for TIBCO products is available on the TIBCO Product Documentation website, mainly in HTML and PDF formats.

The TIBCO Product Documentation website is updated frequently and is more current than any other documentation included with the product. To access the latest documentation, visit https://docs.tibco.com.

Release Version Support

Some release versions of TIBCO Spotfire products are designated as long-term support (LTS) versions. LTS versions are typically supported for up to 36 months from release. Defect corrections will typically be delivered in a new release version and as hotfixes or service packs to one or more LTS versions. See also https://docs.tibco.com/pub/spotfire/general/LTS/spotfire_LTS_releases.htm.

How to Contact TIBCO Support

You can contact TIBCO Support in the following ways:

- For an overview of TIBCO Support, visit http://www.tibco.com/services/support.
- For accessing the Support Knowledge Base and getting personalized content about products you are interested in, visit the TIBCO Support portal at https://support.tibco.com.
- For creating a Support case, you must have a valid maintenance or support contract with TIBCO. You also need a user name and password to log in to https://support.tibco.com. If you do not have a user name, you can request one by clicking Register on the website.

System Requirements for Spotfire Products

For information about the system requirements for Spotfire products, visit http://spotfi.re/sr.

How to Join TIBCO Community

TIBCO Community is the official channel for TIBCO customers, partners, and employee subject matter experts to share and access their collective experience. TIBCO Community offers access to Q&A forums, product wikis, and best practices. It also offers access to extensions, adapters, solution accelerators, and tools that extend and enable customers to gain full value from TIBCO products. In addition, users can submit and vote on feature requests from within the TIBCO Ideas Portal. For a free registration, go to https://community.tibco.com.

For quick access to TIBCO Spotfire content, see https://community.tibco.com/products/spotfire.

Cobranding Spotfire

Cobranding Spotfire, or white labeling it, means that you customize its look and feel to your own company profile. You can rebrand TIBCO Spotfire®, your TIBCO Spotfire® Web Player instances, and the TIBCO Spotfire® Server administrative interface by replacing the product name, logo, and similar resources.

The custom logotype images and names are specified in the `cobranding.config` XML file. The custom header for the Spotfire® Web Player and Spotfire® Server are specified in the `WebHeader.htm` file.

🛈   For cobranding to work on a Linux system, cabextract must be installed.

The configuration file, the custom header file, and your custom PNG images are then deployed as a package to the server. The changes to TIBCO Spotfire® Analyst and the server and web player interfaces are visible the next time that users connect to the server.
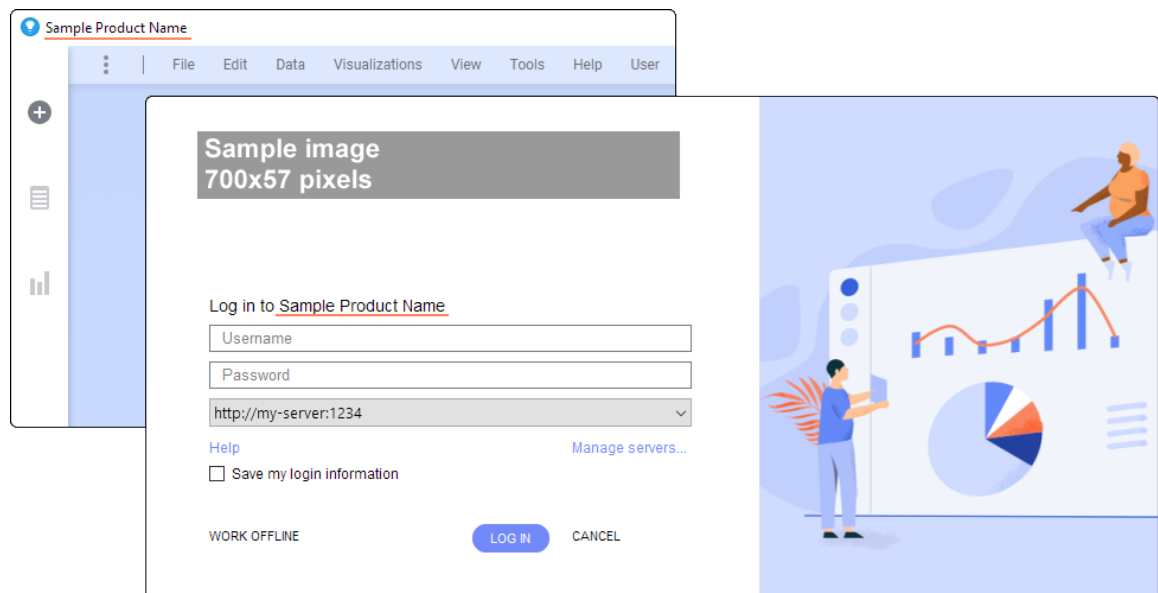
Creating a Cobranding.config File

To replace the product name, banner, header, logo, and other items in the Spotfire interface, you must have a `cobranding.config` file.

Procedure

1. Copy the cobranding template to an XML editor or text editor and save the template as an XML file with the file name `cobranding.config`.
2. Place the file in a local directory that will contain all of your cobranding files.

Replacing the Product Name in Spotfire Analyst

You can replace the product name in the login screen and window titles of Spotfire.
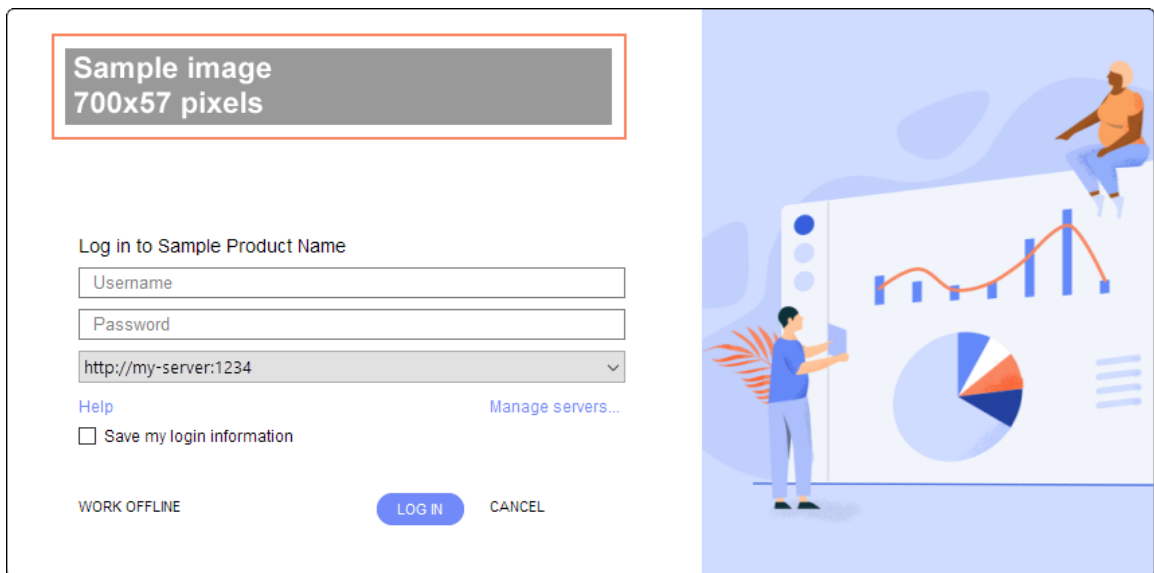

Prerequisites

You have a `cobranding.config` file to work with. If you need one, see Creating a Cobranding.config File.

Procedure

1. Open the `cobranding.config` file in an XML editor or text editor.

2. Locate the section `<productName>Sample Product Name</productName>`.

3. Replace "Sample Product Name" with the product name you want to use in the cobranded version of Spotfire Analyst. If the product name exceeds the available space in the login dialog, the product name will be trimmed.

Replacing the Banner in Spotfire Analyst

You can replace the banner in the startup splash screen, login screen, and the About dialog of Spotfire Analyst.
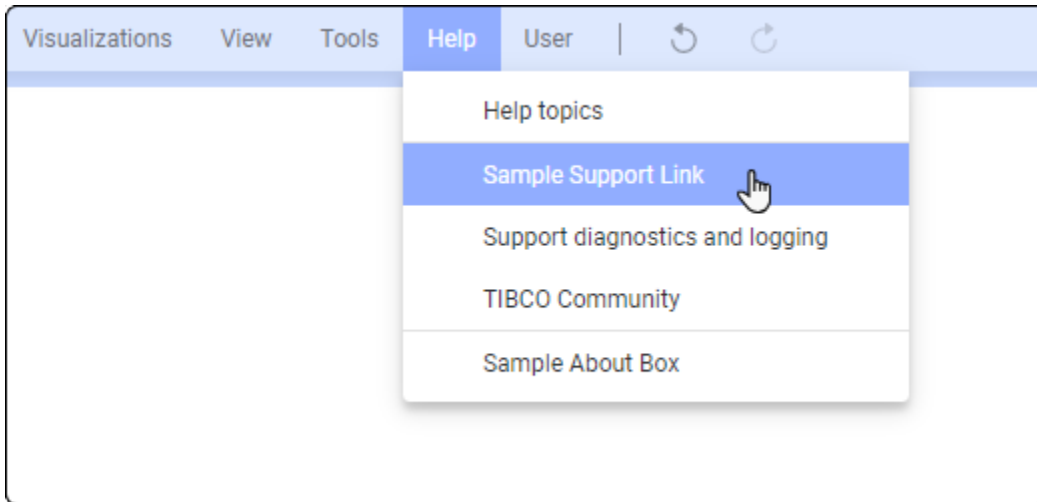

Prerequisites

You have a `cobranding.config` file to work with. If you need one, see Creating a Cobranding.config File.

Procedure

1. Create a banner to use in Spotfire. The banner must have these properties:

   - It is a PNG file.
   - It is 700 pixels x 57 pixels. If the height exceeds 57 pixels, the image is cropped.

2. Open the `cobranding.config` file in an XML editor or text editor.

3. Locate the section `<logoBanner>banner.png</logoBanner>`.

4. Make sure that the name in the `<logoBanner>` section matches the name of the image that you want to use as a banner.

5. Add the image to the local folder where the `cobranding.config` file is located.

Replacing the Support Information in Spotfire Analyst and Spotfire Web Player

You can replace the "TIBCO Spotfire Support" text on the **Help** menu and the URL behind it, as well as the link that follows the text "For support, please contact" in the About dialog. These changes affect both Spotfire Analyst and the Spotfire Web Player.

Prerequisites

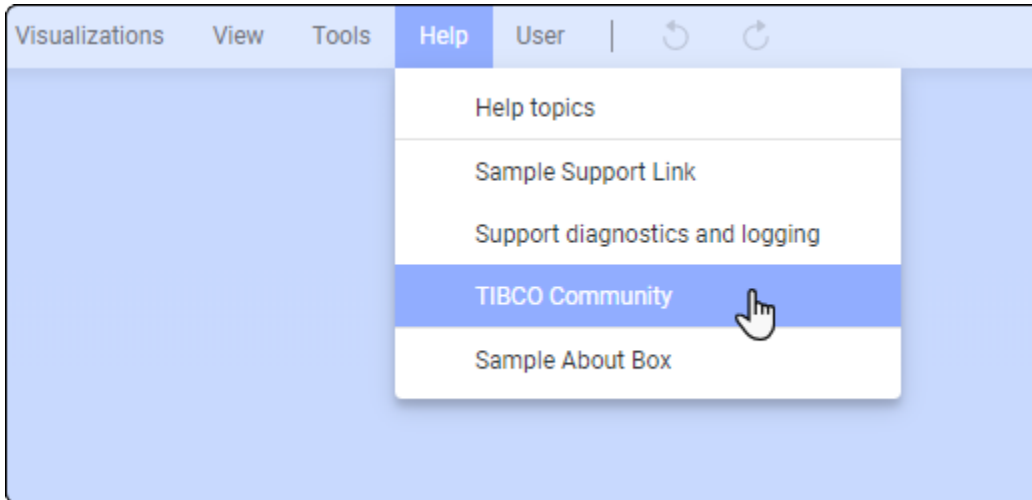You have a `cobranding.config` file to work with. If you need one, see Creating a Cobranding.config File.

Procedure

1. Open the `cobranding.config` file in an XML editor or text editor.

2. Locate the following section:

```
<support>
    <text>Sample &amp;Support Link</text>
    <url>www.example.com/support</url>
</support>
```

3. Replace "Sample Support Link" with the text that you want to use on the **Help** drop-down menu.

4. To select a letter as the access key for this menu item, type `&` in front of the letter.

5. Replace "www.example.com/support" with the support URL that you want to use for the link. This URL will also appear in the About dialog.

Replacing the TIBCO Community Option in Spotfire Analyst and Spotfire Web Player

You can replace the text for the "TIBCO Community" option on the **Help** menu, and the URL behind it. These changes affect both Spotfire Analyst and the Spotfire Web Player.

If you want, you can decide not to display the **TIBCO Community** option at all in the Help drop-down menu, rather than replacing it. Use the preference setting `ShowCommunity` in the Spotfire Administration Manager. Set the value of the preference to `False` for the user groups that you want not to see the **TIBCO Community** option.

Prerequisites

You have a `cobranding.config` file to work with. If you need one, see Creating a Cobranding.config File.
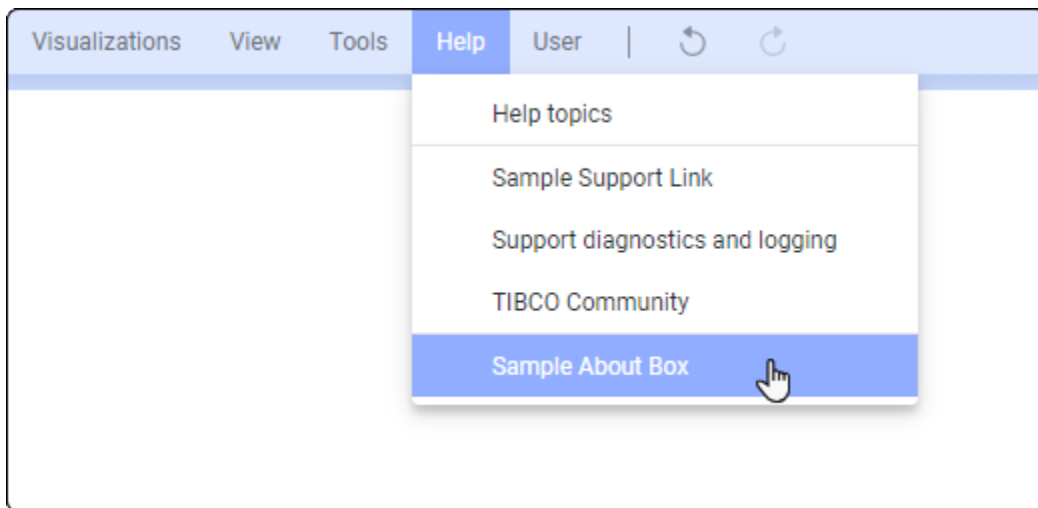
Procedure

1. Open the `cobranding.config` file in an XML editor or text editor.

2. Locate the following section:

```
<community>
    <text>TIBCO Community</text>
    <url>https://community.tibco.com/products/spotfire/</url>
        </community>
```

3. Replace "TIBCO Community" with the text that you want to use on the **Help** drop-down menu.

4. To select a letter as the access key for this menu item, type `&` in front of the letter.

5. Replace "https://community.tibco.com/products/spotfire/" with the community URL that you want to use for the link.

Replacing the "About" Information in Spotfire Analyst and Spotfire Web Player

You can replace the "About TIBCO Spotfire" text on the **Help** menu, the title of the About dialog, and the URL in the About dialog. These changes affect both Spotfire Analyst and Spotfire Web Player.

Prerequisites

You have a `cobranding.config` file to work with. If you need one, see Creating a Cobranding.config File.

Procedure

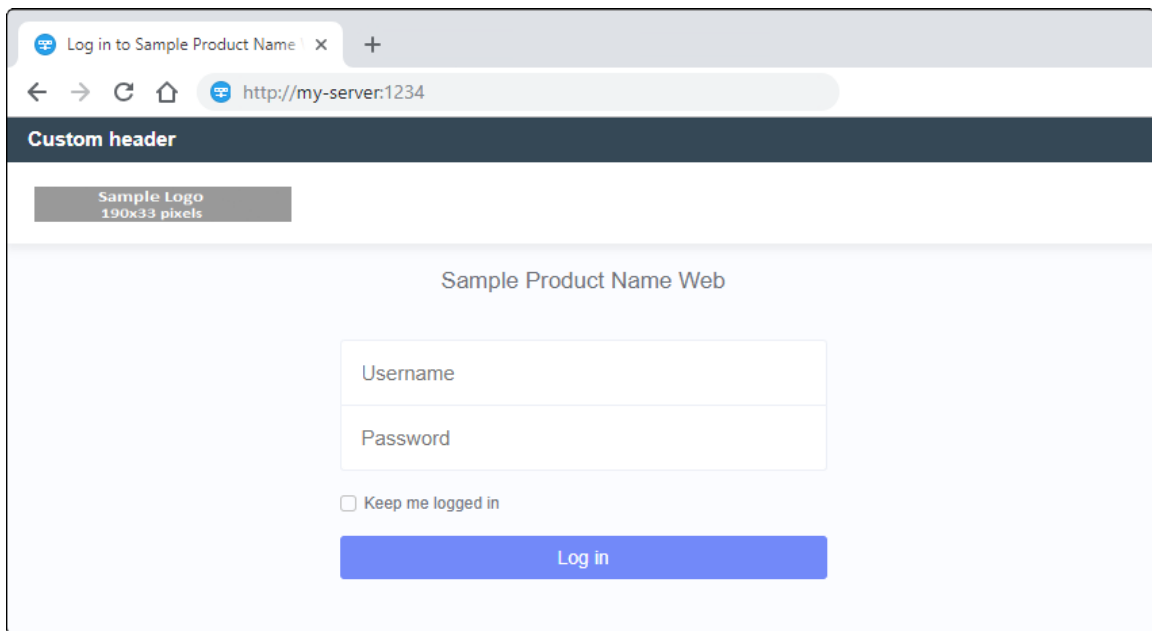1. Open the `cobranding.config` file in an XML editor or text editor.

2. Locate the following lines:

    ```
    <about>Sample &amp;About Box</about>
    ```

    ```
    <companyUrl>www.example.com</companyUrl>
    ```

3. Replace "Sample About Box" with the text that you want to use on the menu and as the title of the About dialog. To select a letter as the access key for the menu item, type `&` in front of the letter.

    > In the web client, the title of the dialog is specified by the product name.

4. Replace "www.example.com" with the URL that you want to use in the lower-left corner of the About dialog.

Replacing the Product Name in the Spotfire Server Web UI

You can replace the product name on the login screen, and other places where the product name is shown in the web and administration user interface.
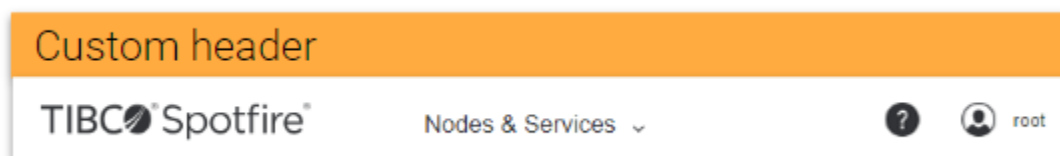
Prerequisites

You have a `cobranding.config` file to work with. If you need one, see Creating a Cobranding.config File.

Procedure

1. Open the `cobranding.config` file in an XML editor or text editor.

2. Locate the section `<productNameWeb>Sample Product Name</productNameWeb>`.

3. Replace "Sample Product Name Web" with the product name that you want to use in the co-branded version of the web client. If the product name exceeds the available space, the product name will be trimmed.

Adding Custom Headers to Spotfire UIs

You can use your own header in the Spotfire UIs. If you include the custom header in the cobranding package, and add the cobranding package to the default deployment area, the header will be displayed in the Spotfire Server UIs and the web player UIs. No restart or update is required, but you might need to refresh the web page.

By default, the custom header as well as the Spotfire header will be displayed. It is possible, though, to hide the Spotfire header. For more information, see "Hiding the Spotfire header in the user interface" in the TIBCO Spotfire® Server and Environment Installation and Administration help.

The procedure below describes how to add a custom header to the cobranding package. Follow the steps, and then deploy the cobranding package to enable the custom headers.

Prerequisites

You have a `cobranding.config` file to work with. If you need one, see Creating a Cobranding.config File.

Procedure

1. Create a custom header to add to the Spotfire environment. You can copy and edit the WebHeader template file.

   > If you want to change the product logo displayed under the custom header, this is controlled in the `cobranding.config` file. Locate the section `<navigationLogo>libraryNavigationLogo.png</navigationLogo>`. Make sure that the file name inside the `<navigationLogo>` ... `</navigationLogo>` tags matches the name of the image file you want to use for the logo. The image file should have the dimensions 190x33 pixels.

2. Add the custom header HTM file to the local folder where the `cobranding.config` file is located.

3. Open the `cobranding.config` file in an XML editor or text editor.

4. Locate the section `<web>` ... `<header>WebHeader.htm</header>` ... `</web>`.

5. Make sure that the name in the `<header>` section matches the name of the HTM file that you want to use as a header.

Various header display options

In case you want to display the custom header only for a certain UI, or you want different web players to use different custom headers, the attribute `source` in the `Spotfire.Dxp.Worker.Web.config` file is used. The attribute can be set to any of the values `default`, `local`, and `none`.

By means of the different attributes, the following display options are possible (the first option is the default display option which you get when following the steps in the section above):

- The custom header is visible in the Server UI as well as all web players. In this option, the value of the `source` attribute is `default` in the `Spotfire.Dxp.Worker.Web.config` file for each of the web players. (The default value of the `source` attribute is `default`.)

- The custom header is visible only in the Server UI.

  1. Deploy the cobranding package containing the custom header in the default deployment area.

  2. For each web player, make sure `source` is set to `none` in its `Spotfire.Dxp.Worker.Web.config` file.

- The custom header is visible only in all of the web player UIs

  1. Check that no cobranding package is deployed in the default deployment area. (If a cobranding package is deployed in the default deployment area, the header will automatically be visible in the server UI.)

  2. Make sure that the cobranding package containing the custom header is deployed in a non-default deployment area.

  3. For each web player, make sure `source` is set to `local` in its `Spotfire.Dxp.Worker.Web.config` file.

     > Any web player that is deployed in the default deployment area will not get a custom header.

  You can, if you want, make the custom header invisible in a separate web player. Then simply set `source` to `none` in its `Spotfire.Dxp.Worker.Web.config` file.

     > It is possible to use different custom headers in different web players by adding cobranding packages containing different headers to different deployment areas. Then set `source` to `local` in the `Spotfire.Dxp.Worker.Web.config` file file for each of the web players.

Creating and Deploying a Cobranding Package

You must create and deploy a package containing the `cobranding.config` XML file, the images, and the custom header HTM file to be used in the cobranded version of Spotfire.

Prerequisites

- You must have the following in a local folder:

  - An edited `cobranding.config` file.

  - All the images you plan to include.

  - If you plan to use a custom header, a custom header `.htm` file.

- For cobranding to work on a Linux system, cabextract must be installed.

You must use the Spotfire® Package Builder to create the cobranding package.

Procedure

1. Download and unpack the latest version of the "TIBCO Spotfire Developer Software" from the TIBCO eDelivery site. The software is listed under "Components found" in the search results.

2. Start Spotfire Package Builder.

3. Click **Manage**, and in the Manage Configurations dialog click **Add**.

4. Enter a name for the configuration, and then click **OK** twice.

5. In the main Package Builder dialog, click **File** > **Add TIBCO Spotfire Distribution** , and then browse to and select the Spotfire Modules folder. By default, this folder is located here: `C:\Program Files (x86)\TIBCO\Spotfire\<version number>`. Click **Select Folder**.

6. In the main Package Builder dialog, expand **TIBCO Spotfire Distribution** and select the check box of the imported client version.

7. Click **Add**, leave the selected option **From folder**, clear the **Source code folder** check box, and then browse to and select the folder that contains all your cobranding project files.

8. Click **Select Folder** and then click **Next**.

9. On the next page, select **Create a module.xml file** and click **Next**. (If the file already exists, click **Yes** in the "File exists" message.)

10. On the next page, select both the **cobranding.config** check box and the words "cobranding.config" and then, under **Public resource name**, enter the text `cobranding.config`.

11. Select all the files to include in the package, including the `cobranding.config` file, and click **Next**.

12. In the next dialog, give the project a name.

13. Under **Intended client**, select one of the following and then click **Finish**:

    - **TIBCO Spotfire Installed Client** to cobrand just Spotfire Analyst.
    - **TIBCO Spotfire Web Client** to cobrand Spotfire Web Player.
    - **TIBCO Spotfire Any Client**

14. In the main Package Builder dialog, select the new project and then click **File** > **Build package file** .

15. In the Save Package dialog, select a location for the package file and click **Save**.

16. Click **Validate and Save**.

17. Deploy the cobranding package to Spotfire Server; for instructions, see "Adding software packages to a deployment area" in the Spotfire Server help.

    The cobranding package must be deployed on the default deployment area.

What to do next

- If updates are not applied automatically to the default deployment area, make sure that end users accept the update when connecting to the server.

- If you are adding a custom header to the web client, you must update the Web Player services on each node of the collective; for instructions, see "Updating services" in the Spotfire Server help.

The Cobranding.config Template

You can copy and edit this `cobranding.config` template to create an XML file for your cobranded version of Spotfire.

```xml
<?xml version="1.0" encoding="utf-8"?>
<cobranding>
  <!--
    When specifying a URL, the following characters must be escaped:

        Character      Escape code
        _____
        SPACE             %20
        <                 %3C
        >                 %3E
        #                 %23
        %                 %25
        {                 %7B
        }                 %7D
        |                 %7C
        \                 %5C
        ^                 %5E
        ~                 %7E
        [                 %5B
        ]                 %5D
        `                 %60
        ;                 %3B
        /                 %2F
        ?                 %3F
        :                 %3A
        @                 %40
        =                 %3D
        &                 %26
        $                 %24

    The only valid schemes to use in the URL are HTTP and HTTPS. If a scheme
    is not provided, the scheme is assumed to be HTTP.


    To assign an access key to a menu item, the letter intended
    to be used as access key must be prefixed with an ampersand (&). This
    character also must be XML encoded to &amp;. To display an actual
    ampersand in these items, two escaped ampersand characters must be
    placed next to each other (&amp;&amp;).


    All images used in the cobranding package must be in the PNG format. If
    the images are in a different format, the cobranding package uses the
    default images in TIBCO Spotfire.
  -->


  <!--
    Replaces product name in window title and login dialog of Spotfire Analyst.
    If the product name exceeds the available space in the login dialog, the
    product name is trimmed.
  -->
  <productName>Sample Product Name</productName>


  <!--
    Replaces product name in window title, login dialog, and About page for the
    Web Player. If the product name exceeds the available space in the login
    dialog, the product name is trimmed.
  -->
  <productNameWeb>Sample Product Name</productNameWeb>


  <!--
```

```
  The banner is used in splash screens and the About dialog of Spotfire Analyst.
  The banner should be 700 pixels x 57 pixels, and able to be safely cropped to
  400 pixels x 57 pixels. The cropping is done on the right side of the image.
  Vital image information should be placed on the left side of the image to
  ensure that it will not disappear when cropped.
-->
<logoBanner>banner.png</logoBanner>


<!--
  Replaces the "TIBCO Spotfire Support" text on the Help menu and the support
  link. If the support URL exceeds the available space in the About dialog,
  the link is trimmed and the full URL is displayed in a tooltip.
-->
<support>
  <text>Sample &amp;Support Link</text>
  <url>www.example.com/support</url>
</support>

<!--
  Replaces the "TIBCO community" text on the Help menu, and the link to the
  TIBCO community.
-->
<community>
  <text>TIBCO Community</text>
  <url>https://community.tibco.com/products/spotfire/</url>
</community>

<!--
  Replaces the "About TIBCO Spotfire" text on the Help menu.
-->
<about>Sample &amp;About Box</about>


<!--
  Link in the bottom left of the About dialog.
-->
<companyUrl>www.example.com</companyUrl>


<web>
<!--
  The WebHeader.htm file is used to add a custom header to the server UI
  and Web Player.
-->
   <header>WebHeader.htm</header>

<!--
  The logo shown in the navigation header on the library page. If the
  image exceeds the dimensions 190x33 pixels, the image will be cropped.
-->
 <navigationLogo>libraryNavigationLogo.png</navigationLogo>
 </web>
 </cobranding>
```

The WebHeader Template

You can copy and edit this WebHeader.htm template to create a custom header for the Spotfire Server web UI.

```
<div>
    <h1 style="background-color: #354856; padding: 10px 5px 10px 15px; margin: 0;
font-family: Arial, sans-serif; font-size: 15px; color: white; line-height: 1; font-
weight: bold">
        Custom header
    </h1>
</div>
```