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SAS® Theme Designer 2.5 for Flex

User's Guide

SAS® Documentation

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About This Book

Audience

The intended audience for this document is an administrator or visual designer who wants to change the appearance of their site's SAS Web applications that are deployed with the Adobe Flash player.

This product has not been tested for compliance with U.S. Section 508 standards. For information about the accessibility of SAS products, please send e-mail to accessibility@sas.com.

Chapter 1

Overview of the SAS Theme Designer 2.5 for Flex

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What Is the SAS Theme Designer 2.5 for Flex?

The SAS Theme Designer 2.5 for Flex is a small utility application that enables you to easily customize the appearance of SAS Web applications that are displayed with the Adobe Flash player. The SAS Theme Designer 2.5 for Flex is, itself, a Flex Web application. You use the SAS Theme Designer 2.5 for Flex to create and deploy simple, visually appealing, customized themes.

A theme defines the overall look and feel of an application. It is designed using colors and graphics that are applied to common user interface components and layout containers. A well-designed theme can create a strong visual identity across a product or set of products. SAS recognizes that you might not want to view your SAS applications in the default corporate theme. You might instead want to apply your own branding and customizations, to help the SAS applications fit in with the rest of your software environment. SAS also recognizes that users at your site often use more than one SAS application in their daily work. Having a consistent look and feel ensures that the user's transition from one application to the next is as seamless as possible.

The SAS Theme Designer 2.5 for Flex affects only those applications that use version 2.5 (or later) of SAS Application Themes for Flex. The work that you do in the SAS Theme Designer 2.5 for Flex has no effect on the following types of applications:

- Web applications that are not Flex applications (for example, SAS Web Report Studio 4.3)
- earlier Flex applications from SAS (for example, SAS BI Dashboard 4.3)

Note: See the *SAS Intelligence Platform: Web Application Administration Guide* for information about themes for other types of applications.

Benefits of Using the SAS Theme Designer 2.5 for Flex

The SAS Theme Designer 2.5 for Flex enables you to customize the SAS product line to meet your branding needs and to ensure a unified look across all eligible applications.

SAS Theme Designer 2.5 for Flex includes the following key features:

- A complete graphical user interface (GUI). All tasks can be done with simple point-and-click actions. You do not have to modify configuration files manually or edit the XML content.
- The implementation and deployment of custom themes are entirely within the designer's control. You do not need to redeploy applications or restart Web application servers. With a single click, you can make a new or updated custom theme available to all users in all eligible applications.
- A site can implement multiple custom themes. All deployed themes are available to all end users in all eligible applications.
- You can change the default theme. This is a single setting that applies to all eligible applications and affects all users (except those users who have specified a personal default theme).
- Custom themes that you create in the SAS Theme Designer 2.5 for Flex survive deployment-related activities such as software upgrades.

How to Access the SAS Theme Designer 2.5 for Flex

The SAS Theme Designer 2.5 for Flex is a Web application, so you access it from within a Web browser. The address for the SAS Theme Designer 2.5 for Flex is: **`http://machine:port/SASThemeDesignerForFlex`**.

Note: If your site has configured Web authentication, you cannot log on using a SAS internal account (such as sasadm@saspw). If your site is using SAS authentication, you can log on with an internal account.

Who Can Use the SAS Theme Designer 2.5 for Flex?

Anyone who can log on to SAS Theme Designer 2.5 for Flex can perform all of the tasks that this application offers. However, creating custom themes is a highly specialized and infrequent task that should be performed only by an experienced administrator or designated visual designer.

Prerequisite for Log-on Access to the SAS Theme Designer 2.5 for Flex

SAS Theme Designer 2.5 for Flex includes a predefined role known as Theme Designer for Flex: Administration. In SAS Management Console, you can view this role, and assign groups or users to this role.

By default, the SAS Administrators group belongs to this role as the default set of authorized users that can access SAS Theme Designer 2.5 for Flex and use the application to design, manage, and deploy custom themes. Other users who are assigned to this role have a similar capability to access the application, design, and manage themes. If a user who does not belong to this role attempts to log on to this application, all log-on attempts to the application are rejected and an error message displays.

In addition to the SAS Administrators group, if other users need access to SAS Theme Designer 2.5 for Flex, add these users to the Theme Designer for Flex: Administration role in SAS Management Console. You should exercise caution in giving users access to SAS Theme Designer 2.5 for Flex, because any changes made to deployment of themes can have a global impact on your users.

To view the Theme Designer for Flex: Administration role, go to SAS Management Console and navigate to **Environment Management** ⇨ **User Manager**. In the panel on the right, double-click **Theme Designer for Flex: Administration**. For more information about roles and capabilities or for instructions on how to assign users to roles, see *SAS 9.2 Intelligence Platform: Security Administration Guide*.

Chapter 2

Selected Tasks in the SAS Theme Designer 2.5 for Flex

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About this Chapter

The first task topic in this chapter provides a complete procedure for implementing a custom theme.

The simple user interface and instant preview feature offered by the facilitates an iterative and exploratory design process. For this reason, this document does not provide step-by-step instructions for individual design modifications.

This chapter does provide detailed instructions for selected tasks, to help avoid confusion, optimize your work flow, and minimize the risk of inadvertent disruption of your end users.

Create and Deploy a Custom Theme

1. From the main menu of the SAS Theme Designer 2.5 for Flex, select **File** ⇨ **New**.
2. In the New Theme window, enter a name for your custom theme and select **Base theme**. Click **OK**.

Note: Spaces and most of the special characters are not allowed in the theme name. The theme name can include alphabetic letters, digits, an underscore (_), and a dollar sign ($).

Note: Initially, three base themes are available (**SAS Light**, **SAS Dark**, and **SAS Corporate**). You cannot modify these predefined base themes. The **SAS Corporate** theme enables you to replace the Banner logo. No other custom changes are supported for the **SAS Corporate** theme. After you create and save a custom theme, you can use that theme as a basis for future themes. Such dependent relationships among themes are dynamic. For example, if you change ThemeA, that change affects all themes that are based on ThemeA (except for any design elements that are explicitly specified in the dependent themes).

In the right pane, notice that a sample application that uses the selected base theme is displayed. The right pane provides an automatic, instant preview as you work.

3. In the upper left portion of the **User Interface Components** pane, select a component. Use the controls in the lower left pane to make changes to the selected interface component. The impact of each change is instantly shown in the sample application in the right pane.

   Note: All of the customizable design elements are listed in the **User Interface Components** pane. The sample application on the right contains examples of all of the available components.

   Note: Changes that you make to certain user interface components affect other components. For example, if you change the color for button, the colors for tabs and accordion will change. You can also customize the colors for the tabs and accordion, and override the inherited colors for those items.

4. Repeat step 4 for each interface component whose appearance you want to alter. To save you work at any time, select **File** ⇨ **Save** from the main menu.

   TIP To revert the settings for a particular interface component (undoing all of your unsaved changes to that component in the current session), select the component in the **User Interface Components** pane and then click **Reset to Defaults** in the lower left pane.

5. When you are ready to deploy the new theme, select **File** ⇨ **Save and deploy** from the main menu. In the confirmation message box, click **OK**.

   Note: At run time, both the target theme and its base theme must be available. Each custom theme contains only information about how it differs from its base theme. The base theme is deployed simultaneously with the custom theme; both themes must be available to the consuming applications. If you have additional layers of nesting (for example, a custom theme that depends on another custom theme that in turn depends on a base theme), then all dependent themes must be available. If you deploy a theme whose base theme is not deployed, the application auto-deploy the base theme.

   Note: You can't deploy a theme for only a particular application, or for only a particular set of users. All deployed themes are available to all eligible applications, and to all users.

6. To verify the results:

   a. In a separate browser, launch an eligible application.

   b. Access the application's preferences settings (for example, select **File** ⇨ **Preferences** from the application's main menu).

   c. On the **All SAS Applications** page in the Preferences window, select the new custom theme from the **Themes** drop-down list. Click **OK**.

d. If the appearance of the consuming application does not change immediately, log out and log in to the application to view the application with the new theme.

   TIP You can work iteratively and view results in the consuming application. In the SAS Theme Designer 2.5 for Flex, make changes to the custom theme, and then save and deploy the theme. On your desktop, switch to the browser window where a consuming application is running and simply refresh the page. It is not necessary to relaunch the consuming application.

   TIP It is a good practice to thoroughly review the effects of the custom theme on each consuming application.

Replace the Logo

To replace the SAS logo (on the right edge of the application banner) with a different image:

1. In the list for the **User Interface Components** panel, select **Application banner**.
2. Below the list of components, in the **Logo** group box, click **Browse**. Locate and select the image that you want to use.
3. Save and deploy the custom theme.

Deploy a Custom Theme

As an alternative to the one-step save-and-deploy feature, you can deploy a custom theme that has already been saved. The result is identical to the one-step approach.

1. From the main menu of the SAS Theme Designer 2.5 for Flex, select **Tools** ⇨ **Deploy**.
2. In the Deploy Theme window, select the theme. Note that the predefined themes are not listed because they are always deployed.

   Click **OK**. A new theme becomes available when an end user relaunches an eligible application. Modifications to an existing theme become available when an end-user relaunches or refreshes and eligible application.

   TIP Deploying a theme makes the most-recently saved version of the theme available to end users. If you modify a custom theme, be sure to save the changes before deploying the theme.

Delete a Custom Theme

To permanently delete a custom theme from the system:

1. From the main menu of the SAS Theme Designer 2.5 for Flex, select **Tools** ⇨ **Delete**.

2. In the Delete Themes window, select the theme.

   TIP The predefined themes are not listed because you cannot delete those themes. To avoid unintended results, use caution in deleting themes. Consider theme dependencies. If you delete a theme that serves as a default theme (either globally or for an individual user), the SAS Corporate theme is used as the default.

   Click **OK** .The change takes effect when a user refreshes or relaunches an eligible application.

   Note: If you want to make a theme unavailable for selection by an end user in the application preferences area, you don't have to delete the theme. You can instead undeploy the theme.

Undeploy a Custom Theme

If you want to remove a custom theme from the list of themes that is offered to end users in the application preferences area, undeploy that theme.

1. From the main menu of the SAS Theme Designer 2.5 for Flex, select **Tools** ⇨ **Undeploy**.
2. In the Undeploy Theme window, select the theme.

   TIP The predefined themes are not listed because you cannnot undeploy those themes. To avoid unintended results, use caution in undeploying themes. Consider theme dependencies. If you undeploy a theme that serves as a default theme (either globally or for an individual user), the SAS corporate theme is used as the default.

   Click **OK**. The change takes effect when a user relaunches an eligible application. Note that undeploying a theme does not delete the theme. It just makes the theme unavailable for selection by a user in the application preferences area.

Disable All Custom Themes

In the initial configuration, custom themes are disabled (because no custom themes exist). When you create your first custom theme, custom themes are automatically enabled.

In the unusual circumstance in which you need to disable all custom themes, globally, complete the following steps:

1. From the main menu of the SAS Theme Designer 2.5 for Flex, select **Tools** ⇨ **Disable Custom Themes**.
2. In the confirmation message box, click **OK**.

   When custom themes are disabled, no custom theme information is loaded into eligible applications. The change takes effect when a user relaunches or refreshes an eligible application.

Change the Default Theme

In the initial configuration, the SAS corporate theme is the default theme. A user can select a different, personal default theme from the preferences area in any eligible application. For that user, the personal default theme selection overrides the default theme. For that user, all applications are displayed using the selected personal default theme.

An administrator can set a theme other than the SAS corporate theme as the default theme. This change affects only those users who have not already selected a personal default theme. This change does not make other themes unavailable or prevent a user from selecting a different, personal default theme.

To change the default theme:

1. From the main menu of the SAS Theme Designer 2.5 for Flex, select **Tools** ⇨ **Set Default Theme**.
2. Select the theme that you want to be the default theme. Click **OK**.

   The change takes effect when a user relaunches or refreshes an eligible application. The change does not affect users who have already specified a personal default theme.

Export a Custom Theme

SAS Theme Designer 2.5 for Flex enables you to export a theme. You can export a custom theme from SAS Theme Designer 2.5 for Flex to a specific folder.

To export a custom theme, follow these steps:

1. From the main menu of the SAS Theme Designer 2.5 for Flex, select **Tools** ⇨ **Export Theme**.
2. Select the theme that you want to export. Click **OK**.
3. Navigate to the folder where you want the theme to be exported.
4. If desired, modify the filename for the theme and click **OK**.

   The theme is exported and saved with a .TDF file extension.

Import a Custom Theme

SAS Theme Designer 2.5 for Flex enables you to import a custom theme. You can import a custom theme from a specific folder to SAS Theme Designer 2.5 for Flex.

To import a custom theme, follow these steps:

1. From the main menu of the SAS Theme Designer 2.5 for Flex, select **Tools** ⇨ **Import Theme**.

2. In the dialog that displays, select the .TDF theme file that you want to import. Click **Open**.
3. The theme is imported and is available within SAS Theme Designer 2.5 for Flex.

   Note: If a theme with the same name already exists within SAS Theme Designer 2.5 for Flex, it cannot be imported.

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About SAS Application Themes for Flex

Introduction to SAS Application Themes for Flex

SAS applications display with the Flex interface that is provided by a particular version of SAS Application Themes for Flex. At start-up time, Flex applications load Flex themes automatically. A theme consists of SWF files that include cascading style sheets (CSS) files. The theme content is downloaded to the client, and is cached by the user's Web browser. As a result, during subsequent uses of the Web application, the theme content loads quicker than when it is initially loaded. The SAS Corporate theme is the default theme for all Flex applications.

Benefits of SAS Application Themes for Flex

Flex applications require SAS Application Themes for Flex, and the themes are downloaded as SWF files to the client's Web browser. Flex theme content runs within the Adobe Flash player and offers the following benefits:

- SAS Application Themes for Flex coexist with SAS Web Application Themes. For example, SAS Information Delivery Portal 4.3 uses the default Web theme, but it displays SAS BI Portlets with SAS Application Themes for Flex.
- Applications that use SAS Application Themes for Flex offer more visual impact, interactivity, and responsiveness.
- Improved visual impact and greater perceived depth are achieved through the use of skins. Skins are graphics that are applied to common user interface components in order to change their appearance. For example, the Corporate theme provides skins with a color palette that reflects the SAS visual identity. Skins also include some stylized graphics in the user interface.

About the Predefined Base Themes

The predefined base themes, SAS Light and SAS Dark, were created simply by overriding the Flex standard (Halo theme) styles. The SAS Light and SAS Dark themes are implemented in a minimal way, without custom graphical skins. The SAS Light theme uses shades of light gray, beige, and white for its color palette. The SAS Dark theme is based on darker, charcoal gray tones.

When you choose a base theme, select the theme that is most similar to your desired color palette. For example, if your dominant corporate color is a rich orange, you might begin with the SAS Light theme as your base. The SAS Light theme uses a warmer palette, with yellows and neutral colors that complement the color orange.

Limitations of the SAS Theme Designer 2.5 for Flex

When you use the SAS Theme Designer 2.5 for Flex, it is important to understand the following points:

- Not all aspects of an application's appearance are customizable. The SAS Theme Designer 2.5 for Flex enables you to modify a rich, carefully selected subset of design elements. The intent is to offer maximum visual impact with minimal effort and minimal risk of unintended results.
- You cannot use the SAS Theme Designer 2.5 for Flex to affect the appearance of graphs.
- This application is not optimized for large numbers of themes or deeply nested hierarchies. It is intended for occasional, highly targeted use.
- This application does not offer manual editing of a theme or direct interaction with configuration files. For SAS Application Themes for Flex, SAS does not support direct interaction with source files. All work should be performed from within the SAS Theme Designer 2.5 for Flex.
- This application does not offer a step-by-step "undo" function.
- This application does not offer history or versioning of files.
- You cannot alter, delete, or undeploy any of the predefined themes provided by SAS.
- You cannot hide a deployed theme from anyone. All deployed themes are available to all end users in all eligible applications.
- You cannot preload a custom color palette into the SAS Theme Designer 2.5 for Flex.

Where to Find More Information

The most recent version of this document is available from the SAS BI Server product documentation page on the SAS support site (**`http://support.sas.com/documentation/onlinedoc/biserver/`**).

Glossary

SAS authentication
a form of authentication in which the target SAS server is responsible for requesting or performing the authentication check. SAS servers usually meet this responsibility by asking another component (such as the server's host operating system, an LDAP provider, or the SAS Metadata Server) to perform the check. In a few cases (such as SAS internal authentication to the metadata server), the SAS server performs the check for itself. A configuration in which a SAS server trusts that another component has pre-authenticated users (for example, Web authentication) is not part of SAS authentication.

theme
a collection of specifications (for example, colors, fonts, and font styles) and graphics that control the appearance of an application.

Web authentication
a configuration in which users of Web applications and Web services are verified at the Web perimeter and the metadata server trusts that verification.

Your Turn

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- If you have comments about this book, please send them to **yourturn@sas.com**. Include the full title and page numbers (if applicable).
- If you have comments about the software, please send them to **suggest@sas.com**.