

# TIBCO Spotfire® Cobranding

*Software Release 7.8*

*January 2017*

*Document Update: 4/10/2017*

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# TIBCO Documentation and Support Service

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Documentation for this and other TIBCO products is available on the TIBCO Documentation site. This site is updated more frequently than any documentation that might be included with the product. To ensure that you are accessing the latest available help topics, visit:

<https://docs.tibco.com>

## How to Contact TIBCO Support

For comments or problems with this manual or the software it addresses, contact TIBCO Support:

- For an overview of TIBCO Support, and information about getting started with TIBCO Support, visit this site:

<http://www.tibco.com/services/support>

- If you already have a valid maintenance or support contract, visit this site:

<https://support.tibco.com>

Entry to this site requires a user name and password. If you do not have a user name, you can request one.

## How to Join the TIBCO Community

The TIBCO Community is an online destination for TIBCO Spotfire customers, partners, and resident experts. It is a place to share and access the collective experience of the TIBCO Spotfire community. The community site offers forums, blogs, and access to a variety of resources. To register, go to the following web address.

<https://community.tibco.com/products/spotfire>

## Cobranding Spotfire

You can customize the look and feel of TIBCO Spotfire®, your TIBCO Spotfire® Web Player instances, and the TIBCO Spotfire® Server administrative interface by replacing the product name, logo, and similar resources with those in your own company profile.

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 the Spotfire Web Player, you also enable the custom header in the `Spotfire.Dxp.Worker.Web.config` file and update the web client services on all nodes.



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 interface are visible the next time that users connect to the server.



If adding a custom header to the web client is the only cobranding you plan to do, you do not need a cobranding package. For more information, see "Manually configuring a Spotfire Web Player service" and "Spotfire.dxp.worker.web.config" in the Spotfire Server help.

## Creating a Cobranding.config File

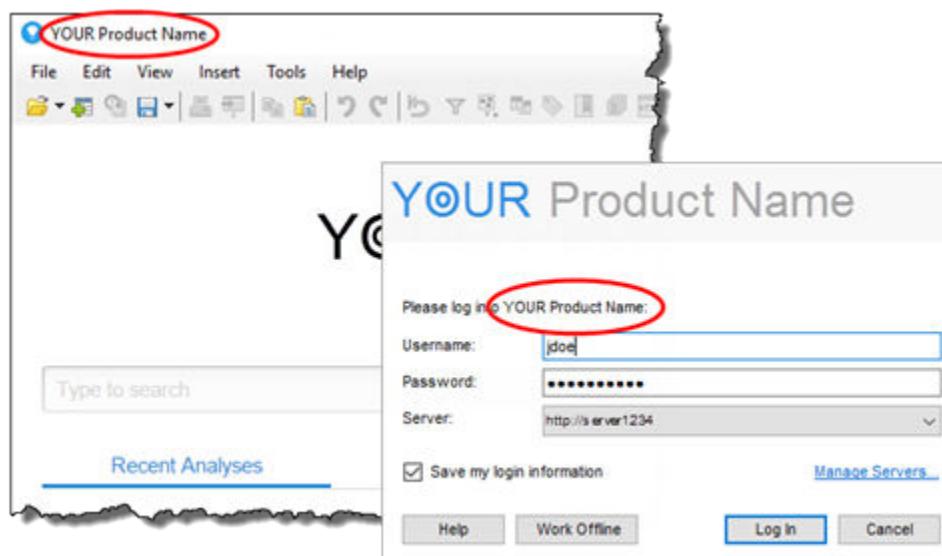
To replace the product name, banner, header, logo, and other items in the Spotfire interface, you must have a `cobranding.config` file.

### 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

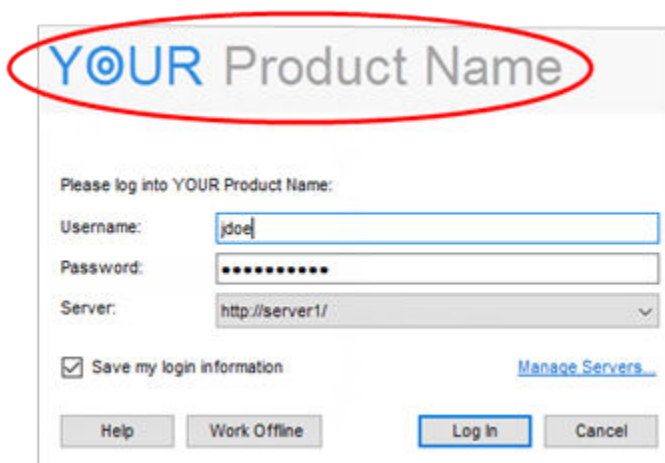
You have a `cobranding.config` file to work with. If you need one, see [Creating a Cobranding.config File](#).

## 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

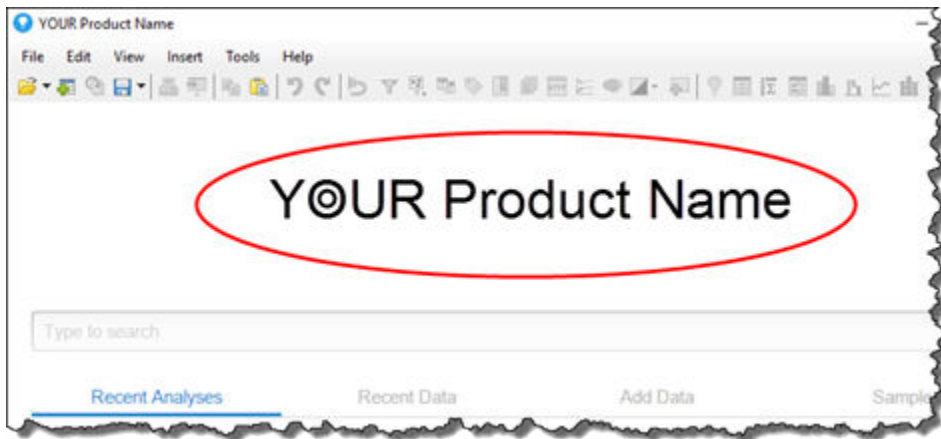
You have a `cobranding.config` file to work with. If you need one, see [Creating a Cobranding.config File](#).

## 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 Start Page Logo in Spotfire Analyst

You can replace the logo on the start page of Spotfire Analyst. This is the `logo.png` file in the template XML file.



### Prerequisites

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

### Procedure

1. Create a logo image to use in Spotfire Analyst. The logo must have these properties:
  - It is a PNG file.
  - It is no larger than 800 pixels x 71 pixels. If it exceeds those dimensions, it will be cropped.
2. Open the `cobranding.config` file in an XML editor or text editor.
3. Locate the section `<logo>logo.png</logo>`.
4. Make sure that the name in the `<logo>` section matches the name of the image that you want to use as start page logo.
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.

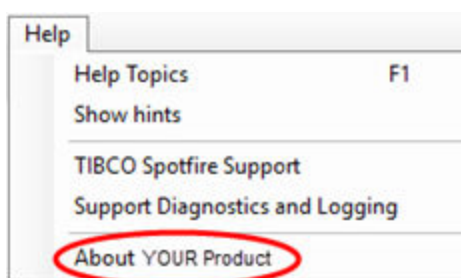
2. Locate the following section:

```
<support>
  <text>Sample &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** 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 "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 &About Box</about>
```

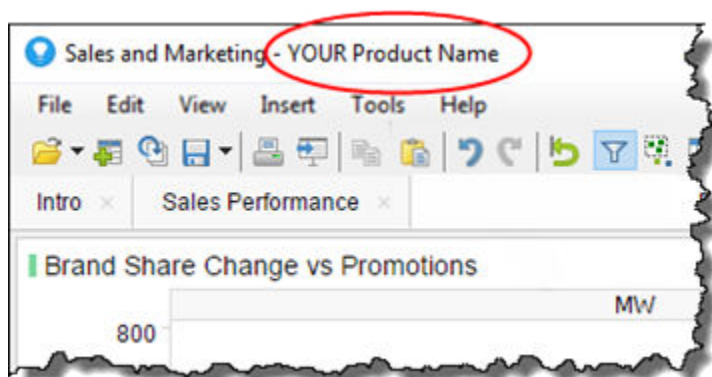
```
<companyUrl>www.example.com</companyUrl>
```
3. Replace "Sample About Box" with the text that you want to use on the menu and as the title of the About dialog. To select a letter as the access key for the menu item, type `&` in front of the letter.
 

 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 Spotfire Web Player

You can replace the product name in the login screen, window titles, and About dialog of 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 section `<productNameWeb>Sample Product Name</productNameWeb>`.
3. Replace "Sample Product Name" with the product name that you want to use in the cobranded version of the web client. If the product name exceeds the available space in the login dialog, the product name will be trimmed.

## Adding a Custom Header to Spotfire Server and Spotfire Web Player

You can add a custom header to Spotfire Web Player and the administration UI in Spotfire Server.

Steps 1-5 describe how to add a custom header to the cobranding package. Follow these steps, and deploy the cobranding package to enable the custom header in Spotfire Server. Steps 6-11 describe how to also enable the custom header in Spotfire Web Player.



If adding a custom header to Spotfire Web Player is the only cobranding you want to do, this can be done without a cobranding package. For more information, see the topics "Manually configuring a Spotfire Web Player service" and "Spotfire.Dxp.Worker.Web.config" in the Spotfire Server help.

### 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](#).



The logo image should be named `CompanyLogoWide.png` and placed in a subfolder to the path containing all the other cobranding files. The subfolder should be named "Images".

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.
6. On the Spotfire Server command line, export the service configuration. Specify the Web Player capability and the deployment area:  

```
config export-service-config --capability=WEB_PLAYER --deployment-area=Production
```
7. Open the `Spotfire.Dxp.Worker.Web.config` file in a text editor or XML editor. After export, this file is located in the <server install dir>\tomcat\bin\config\root directory.
8. Locate the <userInterface> section and set <customHeader enabled="false"> to true.
9. On the command line, import the configuration file back into the Spotfire Server and name the configuration:  

```
config import-service-config --config-name=WebPlayerConfiguration
```
10. On the command line, assign the created Spotfire Web Player configuration to the Web Player service:  

```
config set-service-config --service-id=value --config-name=WebPlayerConfiguration
```
11. After you deploy the cobranding package in Spotfire Server, you must update the Web Player service on each node of your Spotfire implementation. For instructions, see "Updating services" in the Spotfire Server help.

## 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

- Restart the Spotfire Server service.
- 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 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>

<!--
    The logo shown on the welcome page of Spotfire Analyst. If the image exceeds
    the dimensions 800 pixels x 71 pixels, the image is cropped.
-->
<welcomePage>
  <logo>logo.png</logo>
</welcomePage>

<!--
    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 & Support Link</text>
  <url>www.example.com/support</url>
</support>

<!--
    Replaces the "About TIBCO Spotfire" text on the Help menu.
-->
<about>Sample & 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. The logo image should be named CompanyLogoWide.png and
    placed in a subfolder to the path containing all the other cobranding files.
    The subfolder should be called "Images".
-->
  <header>WebHeader.htm</header>

<!--
    The logo shown on the login page. If the image width exceeds 245 pixels,
    the image is cropped.
-->
  <loginLogo>loginLogo2.png</loginLogo>

</web>
</cobranding>

```

## The WebHeader Template

---

You can copy and edit this WebHeader.htm template to create a custom header for Spotfire Web Player.

```
<table cellpadding="0" cellspacing="0" style="white-space:nowrap;" >
  <tr>
    <td style="width: 1px; vertical-align: bottom; ">
      
    <!--
      The logo image should be named CompanyLogoWide.png and placed in a subfolder
      to the path containing all the other cobranding files. The subfolder should
      be named "Images".
    -->
  </td>
  <td style="white-space: nowrap; vertical-align: bottom;">
    <span class="CustomizationAreaLargeText">
      Sample Product Name
    </span>
  </td>
</tr>
</table>
```