Power User Look and Feel

The Look and Feel wizard for the Power User Interface provides access to a wide range of options for changing the look and feel of the knowledgebase for power users. You can add or remove header and footer HTML and company logos; control text font, size, and color; and change the appearance of buttons, tabs, and other interface elements.

The look and feel that a specific user sees is controlled by their primary team. You can save multiple look and feel configurations, called "schemes," and apply them to different teams in the system. This allows you to, for example, give each of your internal departments a unique appearance. You could also instead create a single look and feel scheme in the style of your company and apply it to all power users.

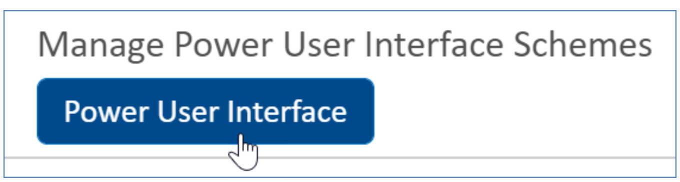
There are separate Look and Feel wizards for the Power User and End User Interfaces, and options are tailored to access permissions for these different user types. For information on the Look and Feel wizard for end users, see End User Look and Feel.

Look and Feel Wizard: Power User Interface

The Look and Feel wizard for the Power User Interface contains a number of tabs for customizing the appearance of the knowledge for power users. Because this is a longer and more involved wizard than others, remember that your changes won't be saved until you click Finish.

To access the Look and Feel wizard for the Power User Interface:

1. Go to **Setup > Look and Feel > Power User Interface**.

   Power User Interface button
2. Edit an existing scheme, or click New to create a new scheme.

As you adjust each setting, you can preview the changes in the example shown on the left side of the wizard. The example refreshes in real time as you work.

Global Tab

From the Global tab, you can define basic options that influence and control other aspects of the look and feel scheme, such as the base scheme, font choices, and a global color palette to apply to various elements on subsequent tabs. You can also set the logo and the icon that appears in the address bar.

Base Scheme

The Select Base Scheme drop-down provides a list of existing schemes, which function as a starting point for a new look and feel scheme. Once you've selected a scheme, click Apply Scheme to apply its settings to the current scheme.

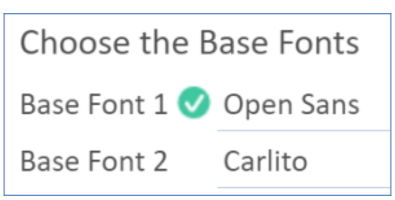
Custom Fonts

The Upload Custom Fonts option is an attached file field that accepts multiple fonts in .ttf format. Once fonts have been uploaded, they can be used as base fonts and are available for use in any of the Look and Feel schemes in the knowledgebase. Fonts are not fully saved until you click Finish and close the wizard.

> ⚠ Font files are licensed software. When uploading custom fonts, use open source fonts or fonts for which you have an appropriate distribution license.

Base Fonts

The primary font of the look and feel uses the Base Font 1 field. Optionally, define a second and third font. Base fonts define the default font choices for the scheme. To use a custom font, start typing the name into the Base Font fields, and then select the auto-complete option when it finds the font name. The selection is confirmed with a checkmark icon.



Base Fonts with the first font showing a green checkmark

This setting is referenced whenever you select Use Primary Font in other font display selections on other tabs of the wizard. Changing the primary font in the Base Font 1 field allows you to quickly change the font across many parts of your look and feel. If the user's browser does not have the primary font available, the system substitutes the Base Font choices in order.

Base fonts will be available in the HTML field editor when they have been applied, including custom fonts.

> To ensure users can view your fonts as intended, use only the most common fonts, such as Arial, Verdana, Open Sans, etc.

Global Color Palette

The color palette lets you define up to 20 colors, either from a drop-down list or through hexadecimal color codes. These colors can then be selected when setting the appearance of elements on the other wizard tabs.

To define a color, do one of the following:

- Choose from the predefined list of colors.
- Enter a hexadecimal code, such as #FFFFFF.
- Click the color icon to open the Select Color window, and then manually select a color, or define RGB or HSV values. Note that HSV and RGB are alternatives, so entering one type will automatically convert the other.

To customize the colors of the interface, start by customizing the base color palette first, and then tweak how individual interface elements reference those colors. To more easily tell which interface elements are controlled by each setting in the color palette, refer the list below offers a general idea of how the out-of-the-box system uses the 20 colors in the palette.

Color Number	Color Use
Color 1	**Main Color** (background, larger buttons, and system)
Color 2	**Modified Main Color** (selected tab, hover text)
Color 3	Selection backdrop, contrast text
Color 4	**Generic Background**
Color 5	Not used in the out-of-the-box Look and Feel
Color 6	Unsaved warning backdrop
Color 7	Not used in the out-of-the-box Look and Feel
Color 8	**Main Border**
Color 9	Special text (calendar weekends, links)
Color 10	**Main Link Hover**

Color 11	**Background**, white space
Color 12	Standard instructional text
Color 13	Another modified main color (All the record links, links within the record)
Color 14	**Unselected**, unassuming text
Color 15	Passive Elements (borders, background, contrast text against main color backdrop)
Color 16	Not used in the out-of-the-box Look and Feel
Color 17	**Warning Contrast** (unsaved text, thin borders, hover effects)
Color 18	Subtle micro-elements (hover on the Status Bar)
Color 19	Not used in the out-of-the-box Look and Feel
Color 20	Brighter micro-elements

When making a Look and Feel scheme, find good color options by browsing your organization's or client's website. Pay close attention to the colors used in graphics, icons, logos, backgrounds, buttons, text, headings, and hyperlinks.

Custom Logo

To use a custom logo, select Use Custom Logo, and then use the dialog to upload your image file. The logo acts as a link to your default homepage.

Toolbar Tab

The Toolbar tab lets you set the appearance of the Toolbar elements, including tabs, menus, font faces and sizes, colors, and borders. The Toolbar refers to the row of tabs that appear at the top of any wizard or record form in the Power User Interface.

This tab also includes settings for the top nav bar, and the appearance of drop-down menus in action bars.

Left Pane Tab

The Left Pane tab controls the look and feel of the Calendar and other items specific to the left pane navigation menu.

Body Tab

The Body tab controls various aspects of the interface, including background color, fonts, scrollbars, hyperlinks, and status messages.

Tables Tab

The Tables tab controls elements on the table view, such as the style of action bars, Quick Search, and the table rows.

Forms Tab

The Forms tab controls the appearance of a variety of elements, such as record forms, error messages, input forms, labels, buttons, comments, and code snippets.

Dashboards Tab

The Dashboards tab manages the appearance of Dashboards and widgets.

Charts/Reports Tab

The Charts/Reports manages the appearance of charts and reports.

Printing Tab

The Printing tab controls the display of elements selected for printing. These elements include the background color used in viewing a record for printing, the label displays, and the field displays.

Icons Tab

The Icons tab controls icons used throughout the system, such as the Edit, Search, or Print icons. Table icons are controlled on the Graphics tab of the Table wizard.

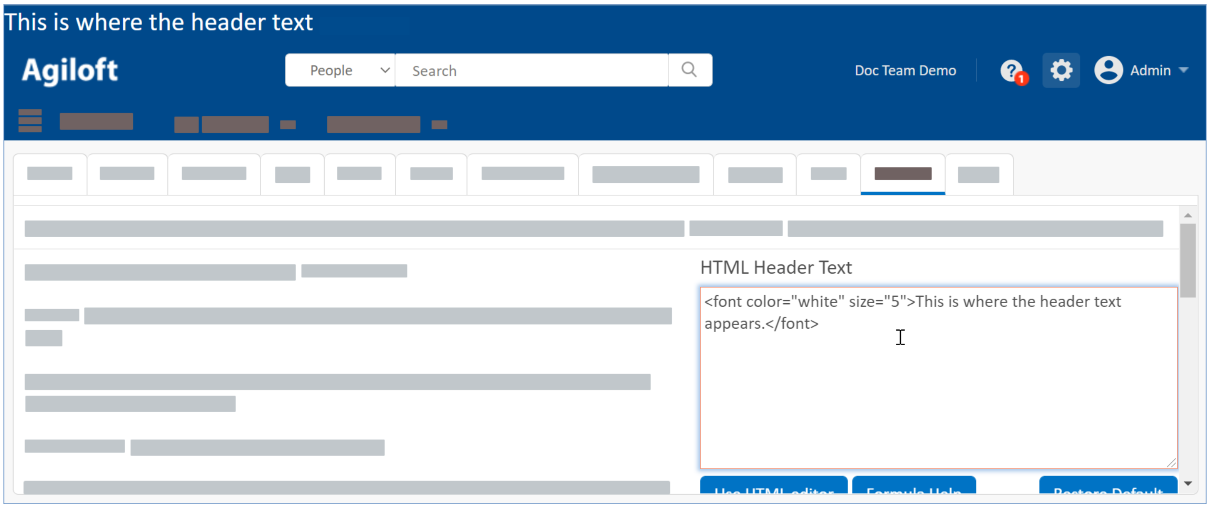
Content Tab

The Content tab lets you create custom headers and footers using HTML. You can use the built-in HTML editor to enter text directly into the text box, upload HTML text created in an editor of your choice, or insert an image.

To create a custom header or footer, click Use HTML Editor or enter HTML directly in the text box.

Use the buttons to customize your header or footer:

- Insert system variables by clicking Formula Help to open the Formula Help wizard and inserting the desired variables.
- Upload HTML text created outside the system by clicking Choose File, browsing for the file, and then clicking Upload.
- Insert an image by clicking Select / Manage Images... and selecting an existing image or uploading your own. Once you've chosen an image, click the file name to append the image with the appropriate HTML to the text box.



Example image with header text

Apply Tab

The Apply tab controls the scheme name and which teams see the Look and Feel scheme. Checking the "and their subteams" option will also apply this scheme to the users whose primary team is a subteam of any of the selected teams. Checking the "Apply changes to me now" option will apply the scheme to you immediately, without having to logout first.

By defining a different look and feel for separate teams, you can allow each of your major customers to see their own logo, provide visually impaired staff with a larger font, and apply a variety of other customizations for specific sets of users.

Best Practice Tip

When you want to modify a Look and Feel scheme, it's best to first create a new scheme by saving an existing scheme under a new name. This allows you to test your changes and then either revert or refer to the original scheme. You can still use the existing scheme as a base by clicking Apply Scheme on the Global tab.