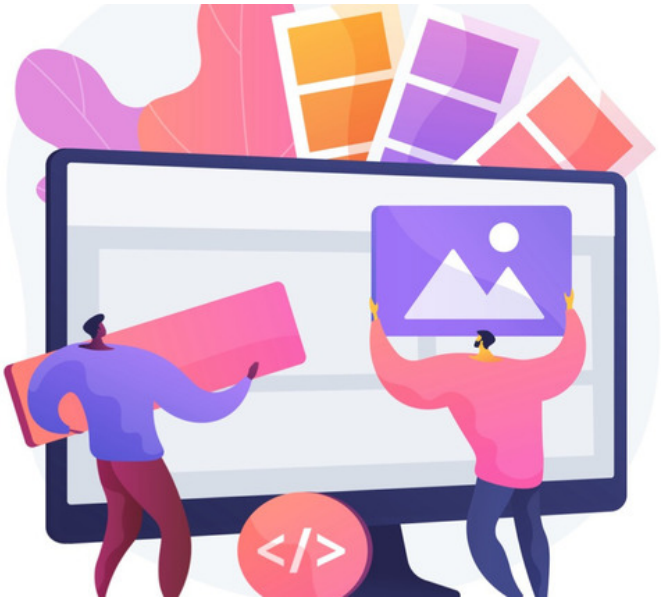
Link to article: https://discover.claromentis.com/knowledgebase/articles/987/how-to-create-themes



How to Create Themes

The Design panel allows administrators to customise the look of the Intranet.

This area is important at site launch to ensure your organisation's logo, colour palette and overall branding are represented in the Master Design.

Additionally, it is possible to create themes with different branding, colours or homepages for non-employees, seasons or events if this is something your site would need.

The Intranet management team must understand how to use the Design panel to make any changes to a site's style as required over time.

What are Themes?

Themes can be created for different audiences.

For example, a theme can be created for extranet areas that are tailored to the users within it and offer a different Intranet experience than the Master Design or other Themes.

Or have some fun with the Intranet and create unique themes for holidays, seasons and events important to your company/the country you are based in for users to choose between or be forced to see upon logging in, it is completely up to you!

How Themes relate to the Master Design

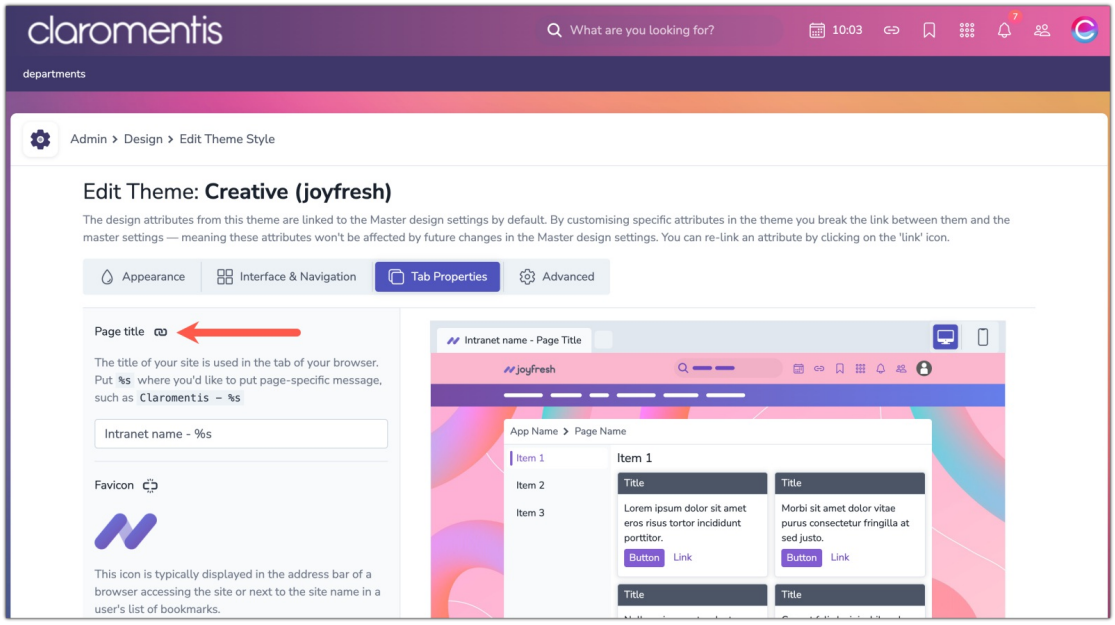
The Master Design sets key style features for users to see, and it's possible to have certain attributes remain consistent in any themes created.

For example, your team may want to create a unique view for suppliers that will be logging into the Intranet that differs from the usual 'employee' view, but remains consistent in some areas e.g. logo and branding but offers a different menu and homepage components.

Whatever your use case, a theme can be created to create different perspectives.

In addition, certain elements can remain consistent across themes if required by linking attributes in a theme back to the master design.

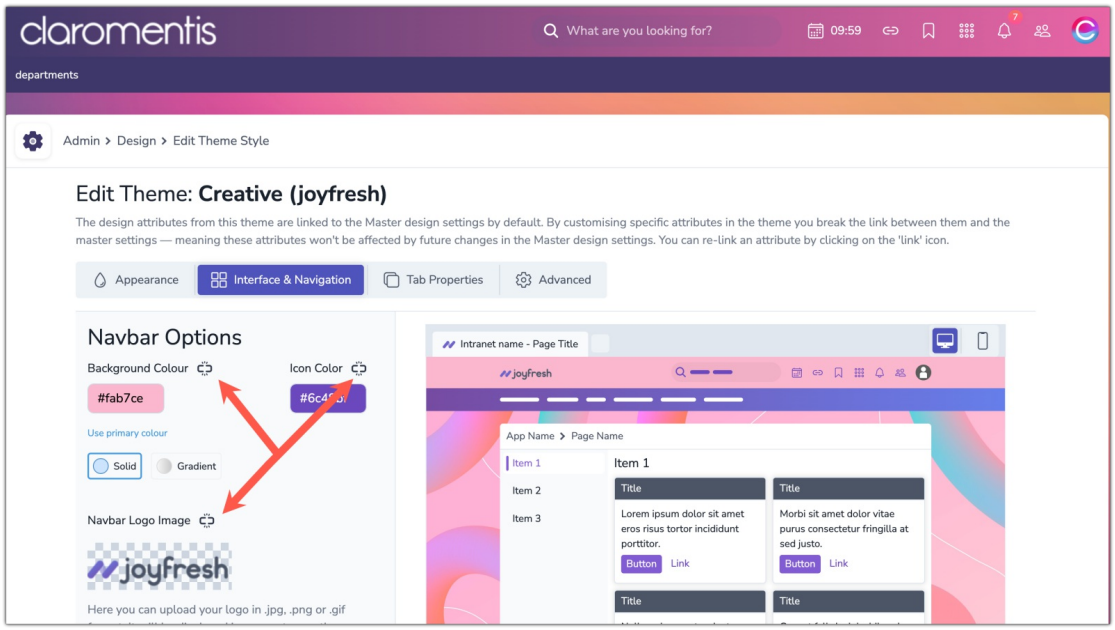
Any linked attribute in a theme is represented by the link icon:



In the above example, this theme has the 'Browser' tab title linked to the Master Design. This means that if that attribute is updated and saved in the Master Design by an administrator, it will also update in any theme that has the attribute linked.

Please note: It is also not possible to change any linked attribute in a theme unless the attribute is first unlinked.

In contrast any attribute not linked in a theme is represented by a broken link icon:



In this example, the background colour of the navigation bar, its icon colour and the logo are not linked to the Master Design.

This means if this attribute is updated in the Master Design it will not affect this theme as it is not a linked attribute.

In this way, themes can either be unique or share attributes with the Master Design that should remain consistent if that suits your use case.

Considerations before creating a Theme

- Linked attributes

When creating themes, it's important to understand the linked attributes and decide for each theme which attributes, if any, should remain linked to the Master to prevent unexpected changes in the themes if the Master is updated.

e.g. Does the theme need to be fully independent of the Master so every attribute can be unlinked, or should certain attributes remain consistent?

The correct set-up will depend on the objective of each theme being created. Over time, if changes are needed to themes it is also necessary for administrators to identify any linked attributes and consider whether they need to update the Master to change it or simply unlink that attribute to update it for that theme only.

- Homepage & Menu

There are certain attributes that can be created ahead of time, the theme homepage and menu, if you wish for these to be unique.

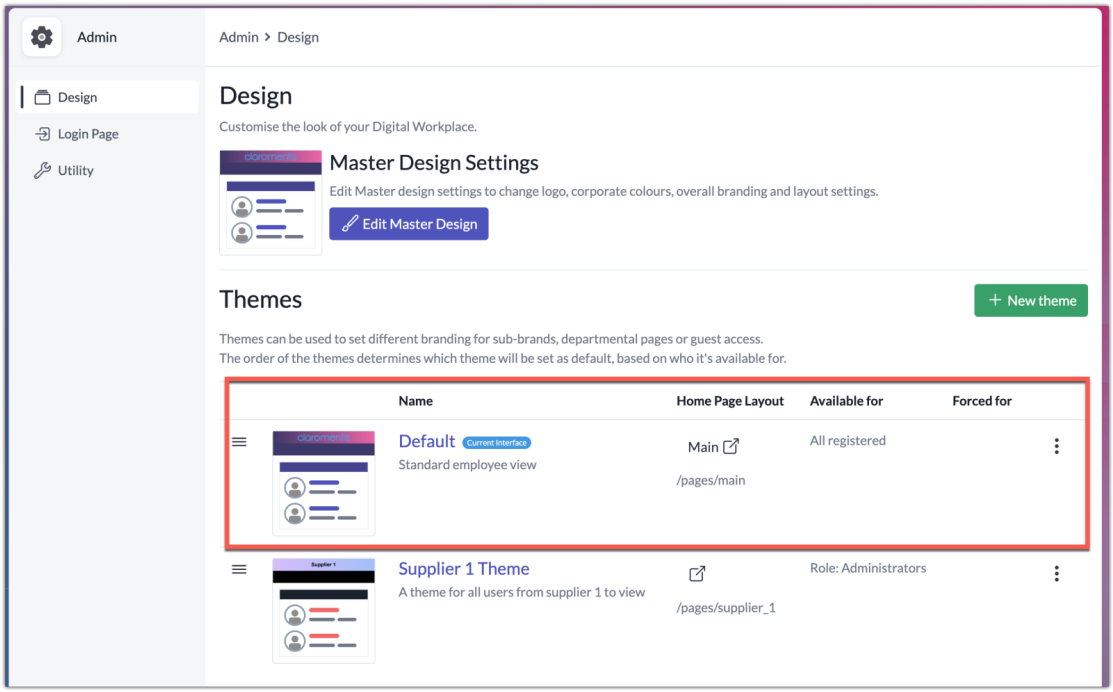
Before creating your theme create its Homepage and Menu so that they appear as selectable when creating the theme.

- Saving a Theme

After saving a theme, it will be automatically applied where possible, including for administrators with permissions.

Once a theme is saved, it's not possible to switch back to the master theme. If needed, create an additional theme specifically for administrators or as a default option to switch to.

To do this, simply create a new theme, as all attributes will default from the Master Design and can be adjusted as needed.



- Only one theme can be set at a time across all devices

The theme a user selects to view (or is forced to view) will be the same on desktop and mobile; a different theme cannot be set per device type. Claromentis also cannot detect what device a user is accessing the Intranet on and 'give' them a certain theme based on the device, e.g. desktop vs mobile vs tablet

Smaller screens e.g. mobile, tablets will show the same content differently in comparison to desktop as this has a larger screen size.

Your team will need to consider how your user base will be accessing the site and test whether the content should be optimised for one, the other or both. e.g. are your user base desktop only, mobile only or a mix?

If a mix, your team need to decide whether users should be told toswitch between themes when changing devices (one optimised for mobile and one for desktop), or if one theme can be optimised to be viewed to your liking suitably from mobile and desktop.

So, if you would like to make a 'mobile' theme tocreate optimised content for smaller screens, consider if these users will ever need to access via desktop, as this affects how they will need to interact with themes and the configuration required by administrators.

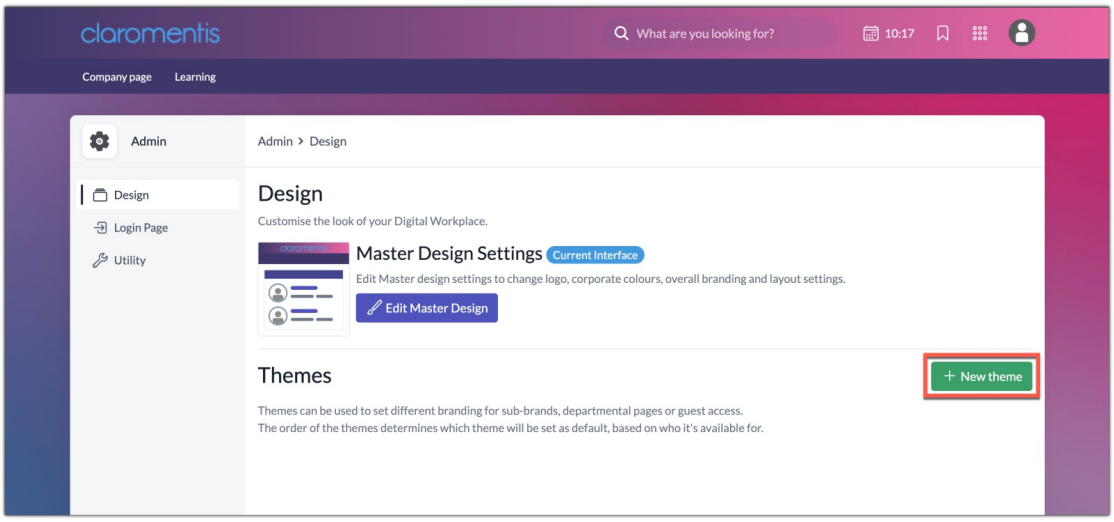
If they will be accessing via mobile only, create a Mobile theme and force those users to it - they will never see any other theme and can view your content optimised for smaller screens.

However, if they need to use a desktop too, then you can still make the mobile theme, but will need to decide if a separate theme for desktop is required for users to switch to when accessing that way, or if the mobile one can be tweaked to be a generic theme that fits the way both devices show the content.

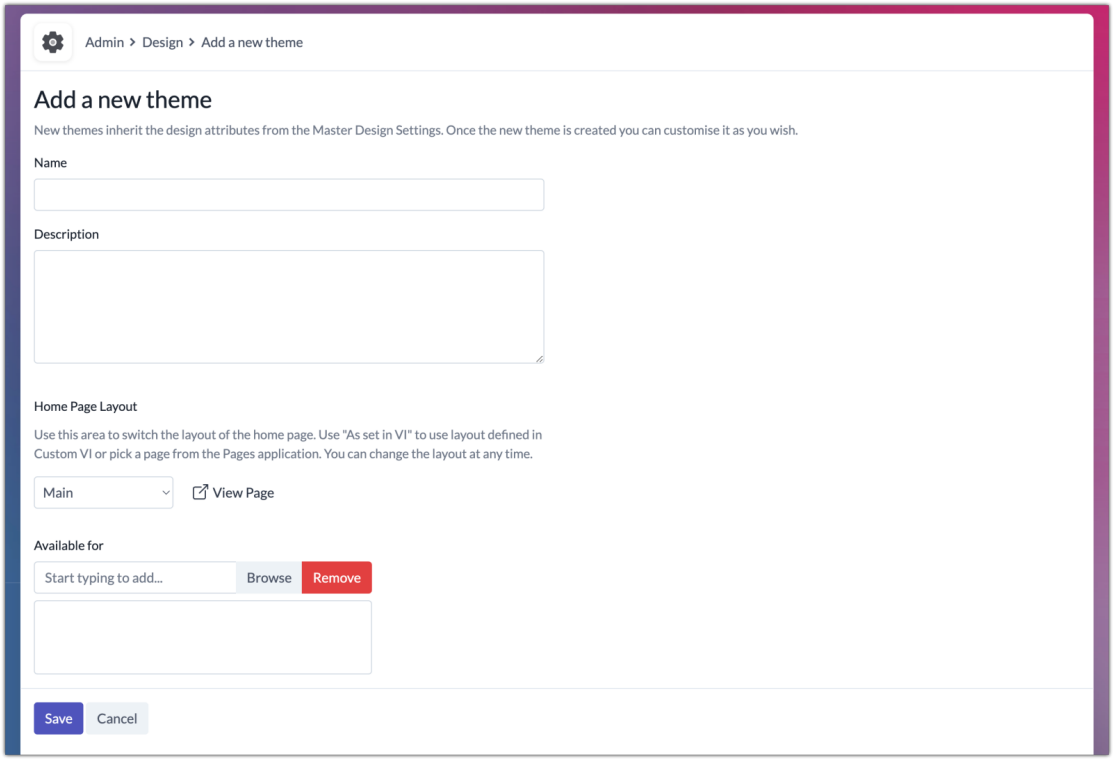
How to Create a Theme

Only application administrators of the Design application can create, edit and manage themes.

1. From **Admin > Design** in the Theme area click **Add new theme**.



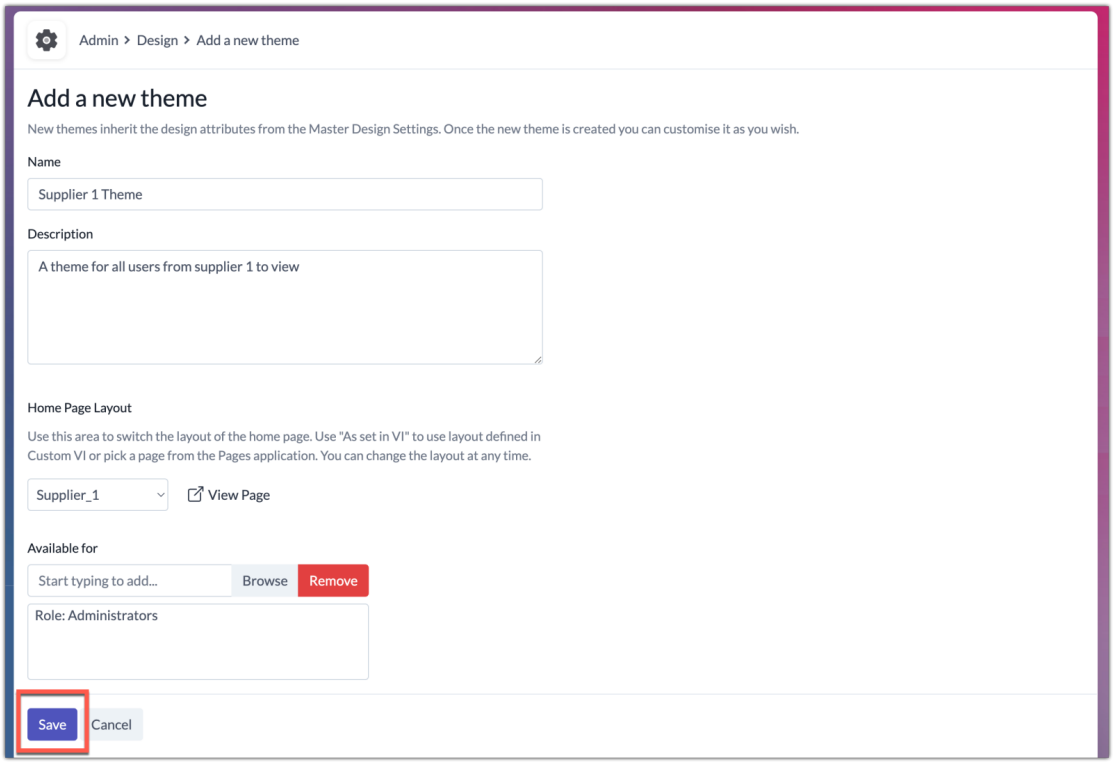
2. Enter the theme details:



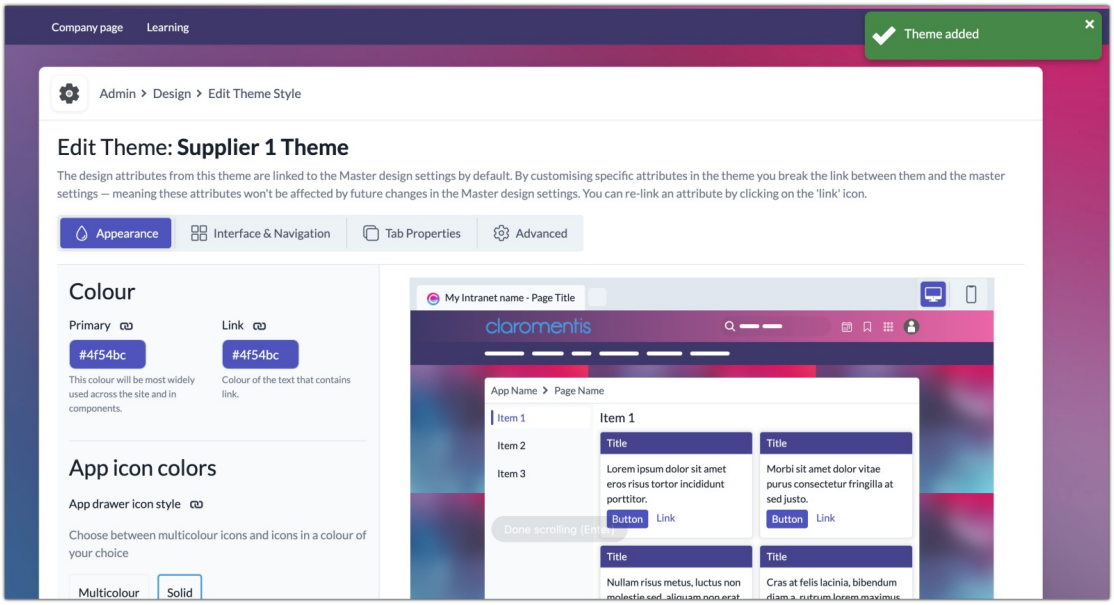
- **Name:** Title of theme
- **Description:** A brief description of the theme
- **Home Page layout:** The homepage that will appear when viewing this theme. Create a unique homepage in the Pages application and it will appear for selection here (or create this after and edit the theme to update it as the homepage at any time)
- **Available for:** The intended audience of the theme. 'Available for' means a user can switch to this theme. For any new theme, it is recommended to only add an administrator Role or Group so they can continue to make edits and update the permissions.

Please note: Users need permission to view the theme and the homepage set for it, so to avoid any access issues make sure your intended audience has been included in the theme and page permissions.

3. Click **Save** to save and create the theme.



4. The theme will be created and the 'Edit style' area opened for it so that edits can continue:



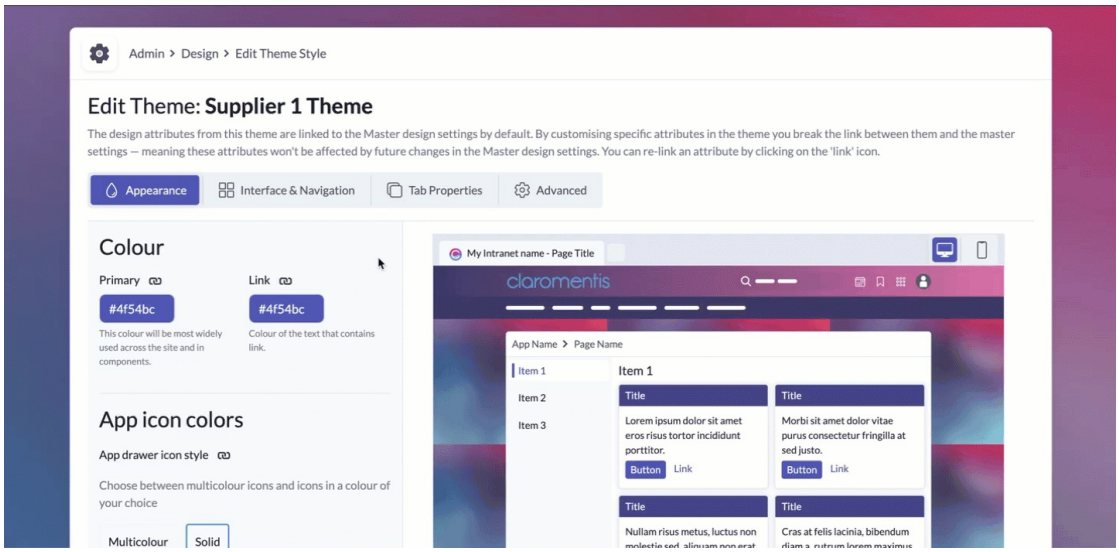
Edit the Style

The options are the same as those detailed in our Master Design guide.

Navigate through the 4 tabs (Appearance, Interface & Navigation, Tab properties and Advanced) in the Design panel to alter the colours, logo and other styling options for the theme.

The only additional consideration is whether to link any attributes back to the Master Design. Once a theme is created, all attributes are automatically linked to the Master, so all its settings are applied.

To make changes, update the attribute and the link icon will break, OR click the link to break it and then change the attribute:



Work through each tab and unlink attributes as you go to make changes to the theme, it's possible to unlink every attribute to make a theme completely independent from the Master and wholly unique.

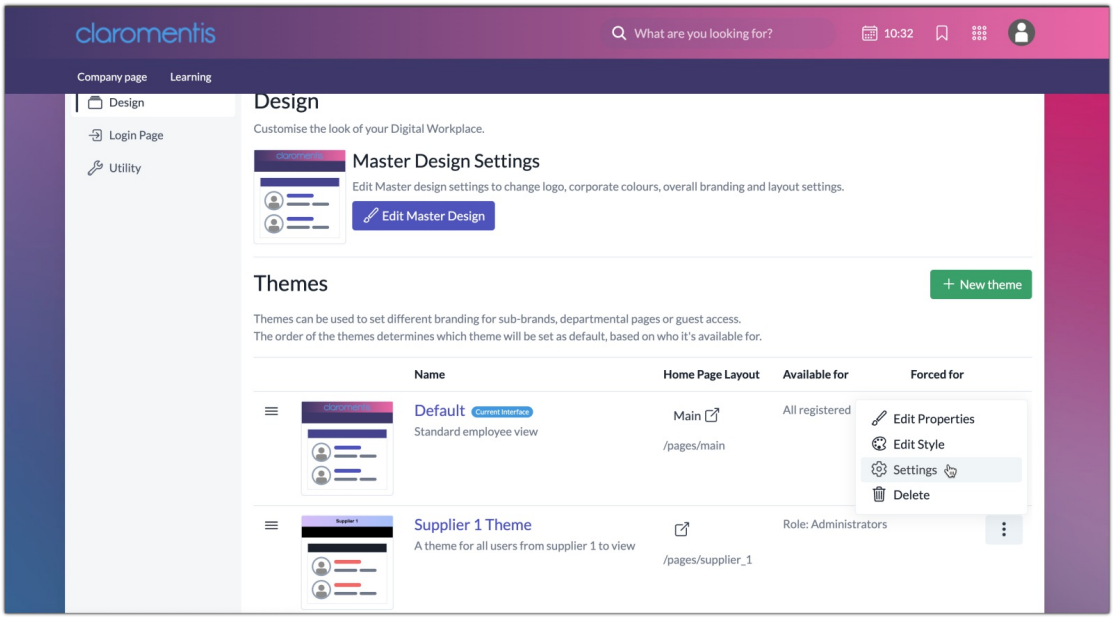
Once the new overall look has been completed apply all changes as shown in this example theme created for a supplier:

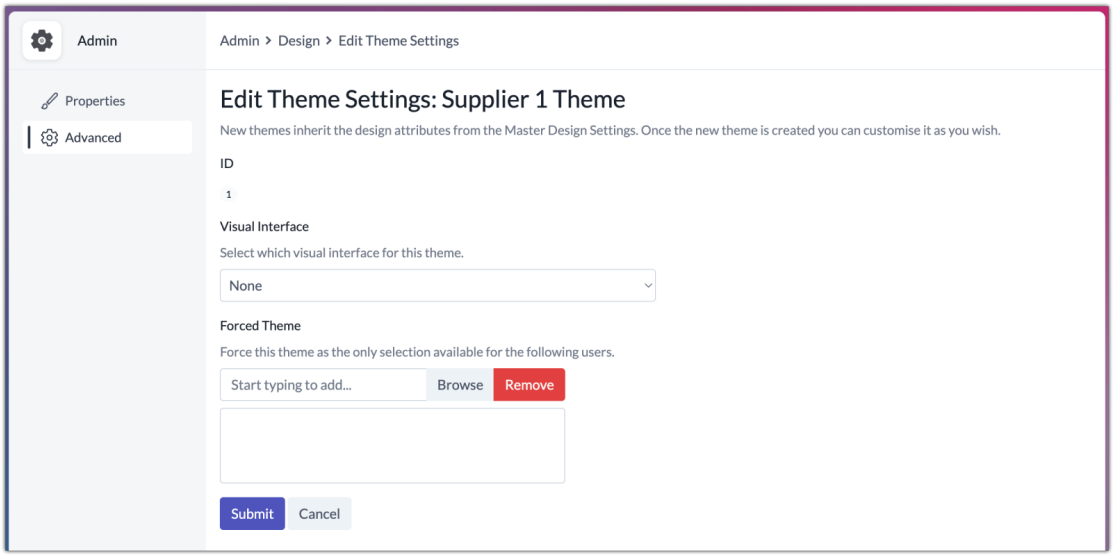
Your browser doesn't support video.
Please download the file: video/mp4

Theme Settings

There are two features that can be configured.

Click the 3 dot menu in line with the theme and select **Settings**:





- **Visual Interface:** The interface is only relevant if you have had custom work created. All pre-designed layouts will be listed.
- **Forced for:** Enter the Group/Role to only see one theme. For example, I need to ensure that the extranet users labelled 'Supplier 1' can only view the theme that is specifically created for them. They should not see other themes listed in 'My settings' or be able to switch themes.

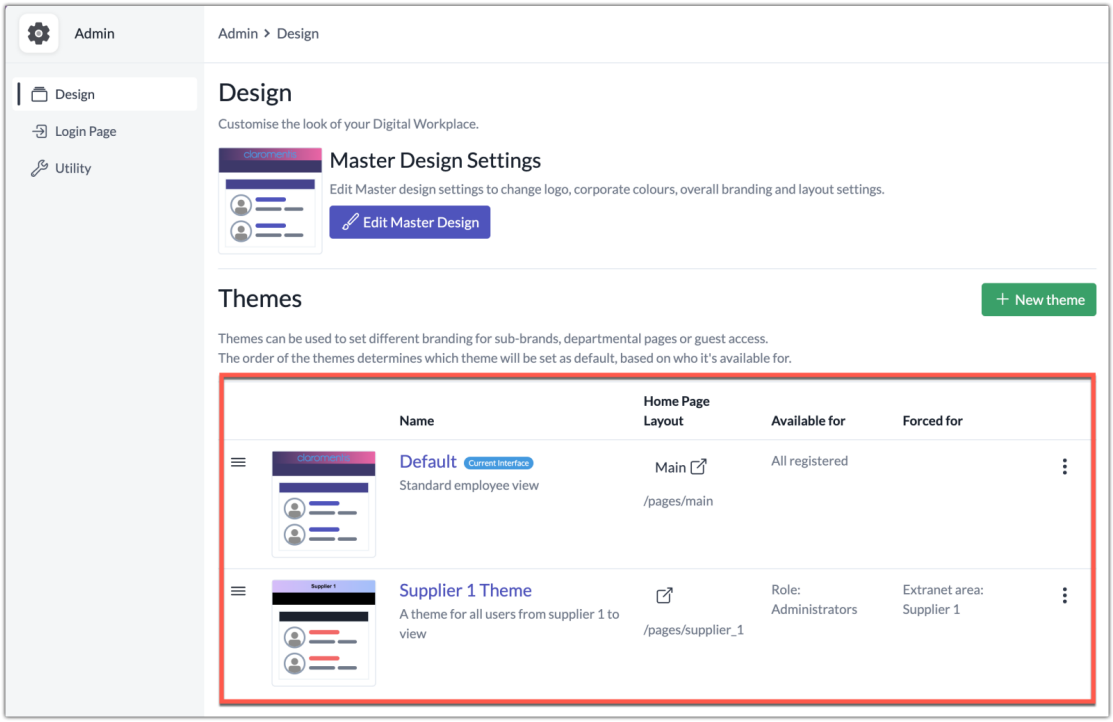
Please note: If needed, users should only be 'Forced' 1 theme only. If there should be a range of themes available, make them 'Available for' to users so they can switch between them.

For more information, check out our How to Switch Theme guide.

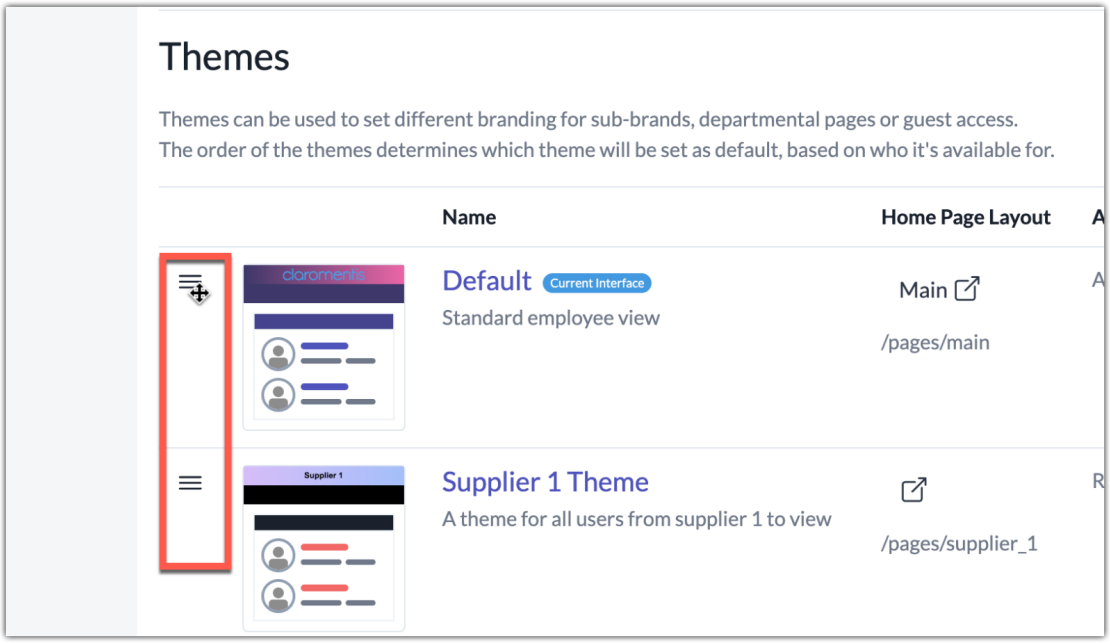
General Admin

Once the Theme has been created it is listed in **Admin > Design**.

Use the table to quickly reference which homepage it is using and who is forced to view it or has it available for them to switch to:

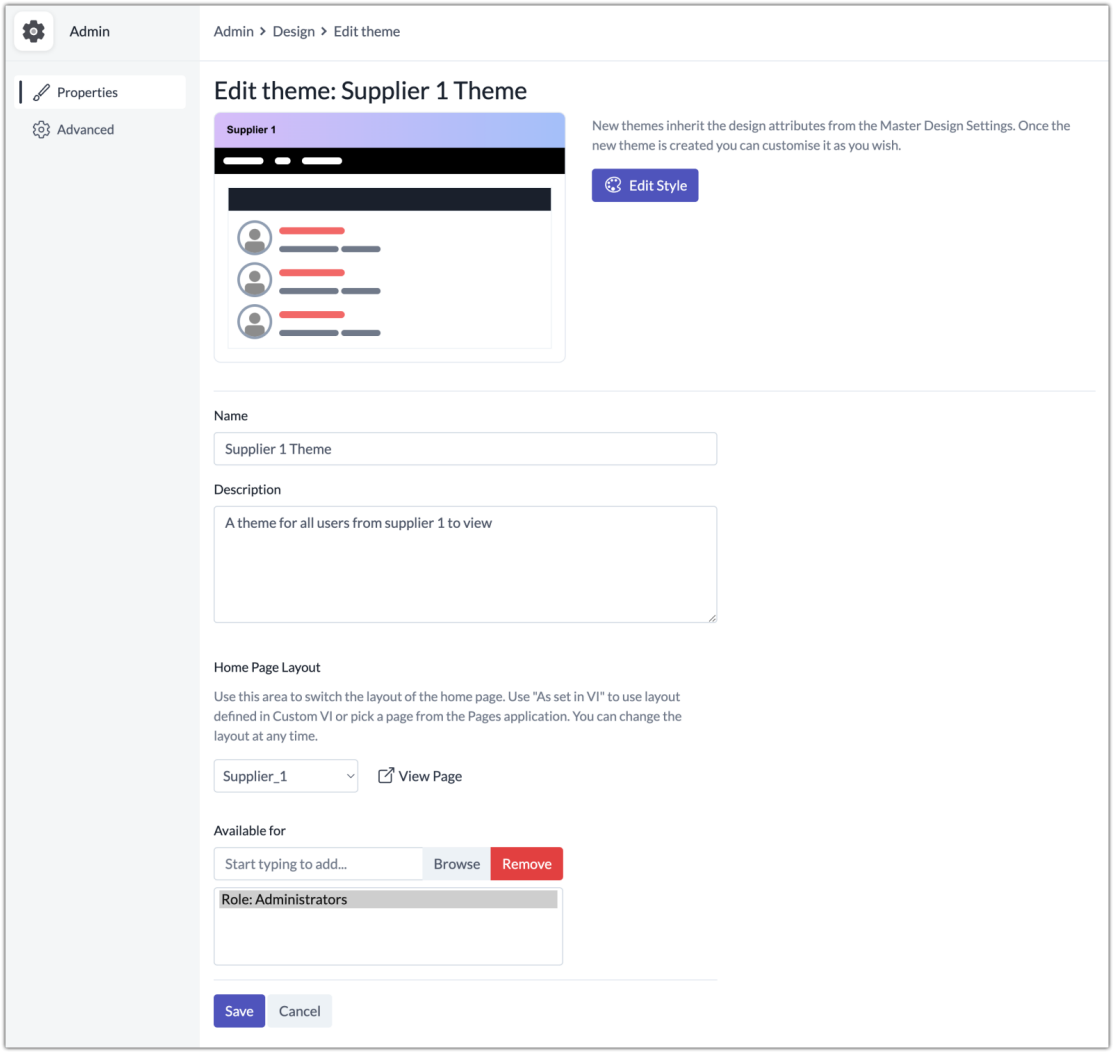


Use the hamburger icon on the left to change the order of the themes - if a user is forced for multiple themes the one listed highest in the order is what they will see (and cannot change from)



Clicking into a theme gives a landing page of 'Properties'.

The title, description, homepage and 'Available for' permissions can be altered.



Created on 3 July 2024 by Hannah Door
Tags: branding, colour, design, style, theme