



Customisation Guide

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Introduction

Welcome to the Symbiant Tracker Customisation Guide. Symbiant Tracker provides a very simple customisation approach using standard web graphics, creatable in most graphics packages and style sheets (css), a standard that will be familiar to even the most novice of web developers.

However, if you are unfamiliar with how to create graphics or style sheets, don't worry as Symbiant Tracker comes packed with several different styles and default graphics for you to choose from.

This guide will also cover how to customise the schedule for due recommendation reminder emails using the standard Windows Task Scheduler.

Customising the Tracker interface

Adding your own company logo and branding

Adding your own logo and branding to the Symbiant Tracker interface couldn't be simpler. The two logo files are called *logo.gif* and *logo2.gif* and are contained in the *img* folder. To add your logos in place of the existing graphics, simply create two image files in the GIF format and save them to the *img* folder as *logo.gif* and *logo2.gif*.

When creating the graphics it is advisable to either create them with a transparent background or using the same background colour as the header of the tracker interface where they will be displayed. This avoids an unsightly box around the graphics you create.

Your main company logo should be saved as *logo.gif*, it can be any size but it is not recommended that you have it much larger than the existing graphic as this could through out the layout of the pages.

Your application branding or company slogan should be saved as *logo2.gif*, again it can be any size but keeping it at around the same size as the current graphic will avoid any problems with the interface layout.

It is possible to slightly alter the position of the images using the *style.css* style sheet, for more details on customising this file see **Creating your own application style**.

Changing the style of the application

The Symbiant Tracker interface is based around the W3C's standard Cascading Style Sheets and a few simple graphic files. This means that you can very easily change the whole look of the application by simply editing one file and replacing a few graphics (GIF) files.

Symbiant Tracker comes packed with several styles to help you get started. The styles are contained in the *styles* directory located under the application folder where Tracker was installed.

The *styles* directory contains several sub folders, each of these contain the necessary style sheets and images to create the look of the application. The included styles are:

- Slate grey (default)
- Dark blue (same as grey but in dark blue)
- Maroon (same as grey but in maroon)
- Pastels (same as grey but in pastel colours)
- Professional (a simple clean design)
- Side bar (similar to the professional design but with the menu down the side)
- Pop art (a bright pop art inspired design)

To use any of these styles in place of the default style, simply navigate to the appropriate directory, select the contents of the desired folder (style.css, report.css, img [dir]), and copy it to the root directory of the Symbiant Tracker application (installation directory).

Note: you may need to clear your browsers cache before the changes will take effect.

Note: if you have created custom logo's these will need to be reapplied after a packed style is applied.

Creating your own application style

The Symbiant Tracker interface is controlled by a single style sheet file, *style.css*. This file is based around the W3C's cascading style sheet standard. To customise the style of the Tracker application, simply load the *style.css* file into any standard text editor or HTML (style sheet) editor.

All the basic style rules apply, you can change the colours, fonts, sizes, margins, positing etc. of all the HTML elements. Tracker also provides a few specific style elements and classes that relate to specific items on the page, these are:

#header	The header block (this contains the logos)
#logo	The main logo graphic
#logo2	The second logo or branding graphic
#menuBlock	The container for the individual menu items
#contentBlock	Holds the container for the actual Tracker controls.
#container	The actual Tracker controls
#footer	The footer block (contains the license and copyright information, it is illegal not to display this content)
#comments	The overall style of the new action status history comments table.
.menuItem	An individual menu item
.menuSelected	The selected menu item (i.e. the currently active section)
.gridHeader	The header of the recommendations grid
.gridItem	An individual row in the recommendations grid
.gridAlternate	Alternate rows of the recommendations grid
.gridPaging	The next / previous page count of the recommendations grid
.gridAttention	Rows of the recommendation grid that require special attention (i.e. when a recommendation is past its due date)
.gridNew	New recommendations added to the grid that have not yet been actioned (auditee only).
.commentHeader	The header for individual comments in the new action status comments history table.
.commentItem	An individual comment in the new action status comments history table.

For more details on style sheets and how to create and configure them, log onto the W3C's site at <http://www.w3.org/Style/CSS/>.

The application also uses a few simple graphics to help identify actions in the recommendations table. These graphics are:

addnew.gif	Create a new recommendation (admin only)
edit.gif	Edit or action an existing recommendation
assign.gif	Assign a recommendation to one or more users (admin only)
delete.gif	Delete an existing recommendation (admin only)
status.gif	View the action status history (admin only)

These graphics should be kept to approximately 16x16 pixels and use a transparent background. The graphics should be saved using the appropriate filename to the *img* folder.

For details on configuring the content of Tracker see the Symbiant Tracker User Guide.

Creating your own report style

The Symbiant Tracker reports can also be customised to suite the style required by your company or audit division. To customise the reports open the *report.css* file in any standard text editor or HTML (style sheet) editor.

All the basic style rules apply, you can change the colours, fonts, sizes, margins, positing etc. of all the HTML elements. Tracker also provides a few specific style elements and classes that relate to specific items on the report, these are:

#header	The header block (this contains custom text that can be defined in the Tracker application setup)
#title	The name (type) of the report
#footer	The footer block (this contains custom text that can be defined in the Tracker application setup)
.headerRow	The header row of the actual report (this row contains hyperlinks for sorting the report content so appropriate styles should be used to avoid default link styling if this is required)
.row	An individual row in the report
.alternateRow	Alternate rows of the report

For more details on style sheets and how to create and configure them, log onto the W3C's site at <http://www.w3.org/Style/CSS/>.

For details on configuring the reports headers and footers see the Symbiant Tracker User Guide.

Changing the schedule of email reminders

The email reminder uses the standard Windows Task Scheduler, this allows you to easily change the frequency and time reminders are sent. By default Tracker sets the system to email reminders every weekday at 8:30 in the morning. To change this simply access the *Scheduled Tasks* folder through the *Control Panel* and edit the Properties of the *Symbiant Tracker Email Notification* task.

For instructions on how to change the properties of scheduled tasks select [Help and Support Centre] from the [Help] menu.

To stop the system from sending reminder emails either delete the task entirely or uncheck the *Enabled* box under the Tasks properties.

Reminder emails will be sent, regardless of when the Tracker application was last accessed, when a Recommendations action due date is reached. Emails will continue to be sent at the specified time until the recommendation is actioned by the assigned (emailed) user.

