Customize Portal Components via Config Sets

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V11.1

Overview

As a workflow developer, you can customize various portal components with a config set.

At present, following are the components you can customize through config set:

- Grids
- Menus
- Theme

Procedure

Defining a case config set for customizing portal components is similar to creating a generic case config set.
For procedure, see this article.

You need to create the following YAML files in the ConfigSet AppStudio for each component.

IMPORTANT
You can name the files anything of your choice, but need to keep the *kind* and *metadata name* exactly as mentioned in the table below.

For customizing grids

YAML file	Kind	Metadata name	Command Manager Id
ui grid columns	Document	config-set/v1/-grid-columns/{servicename} Servicename of the grid in the portal. For example, • hotcases • teamleadertasks	sq.ui.command.ft.hotcases

Examples:

- config-set/v1/ui-grid-columns/aggregatedhotcases - For My Operation Cases grid
- config-set/v1/ui-grid-columns/teamleadertasks - For My Teams Cases grid
- config-set/v1/ui-grid-columns/teammembertasks - For Cases Assigned To Me and Cases In Queue grids

Sample YAML file

Download the following sample YAML file for customizing My Cases grid in the portal, with overrides:

- customize_portal_grids.yaml

Add the following code snippet to the YAML file to override and duplicate the custom columns in grid.

```
- type: globalvariablescolumns
  name: workflowAliasCustom
  columnTemplates:
   - type: VariableDataBoundViewColumn
     dataType: System.String
     dataField: workflowAliasCustom
     width: 140
     format: g
     caption: 'Workflow Alias Custom'
```

For customizing menus

YAML file	Kind	Metadata name	Command Manager Id
ui menu columns	Document	config-set/v1/ui-commands	sq.ui.commands.ft.portal

Sample YAML file

Download the following sample YAML file for customizing menu in the portal, with formviewer and deeplink and without overrides:

- customize_portal_menu.yaml

For customizing theme

Prerequisites

- Make sure the `Portal.UI.ConfigSetId` app variable is implemented and functional.
- Logo (old or new) is correctly included in Base64 format within the YAML file.

YAML file	Kind	Metadata name	Command Manager Id
uiportal theme	Document	config-set/v1/portal-theme	sq.ui.commands.ft.portal

Sample YAML file

Download the following sample YAML file for customizing theme in the portal:

- customize_portal_theme.yaml