

Roxen

Forms and Menus

Purpose

This workbook is designed to provide a training and reference tool for placing University of Alaska information on the World Wide Web (WWW) using the Roxen SiteBuilder Content Management System (CMS), Version 5.

Office of Information Technology, Support Center Training and Development Group will update this workbook as features are added and upgrades are installed. Much of the information for this workbook was drawn from Roxen On-line Documentation. A version of this workbook will be available electronically.

Training Objectives

UA Office of Public Affairs (OPA) assists Statewide end users by providing technical and design assistance. UAF University Marketing and Communications assists UAF end users by providing technical and design assistance. The Office of Information Technology (OIT) maintains the CMS environment and assists all UA end users with sites maintained in Roxen CMS.

- At the end of this class you will be able to create and deploy a form, view the results, and customize your site menus.

Log In

Before you can create a form you must log in.

Log into Roxen (Training Session)

Open your web browser

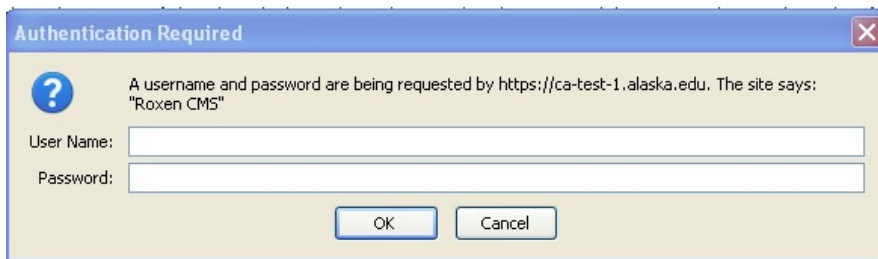
Type the URL: <https://cms-test-edit.alaska.edu/training/newsite/>

Press **[Return]**

Some Browser Specific security dialog boxes may pop up, if they do accept them and the following login page will appear

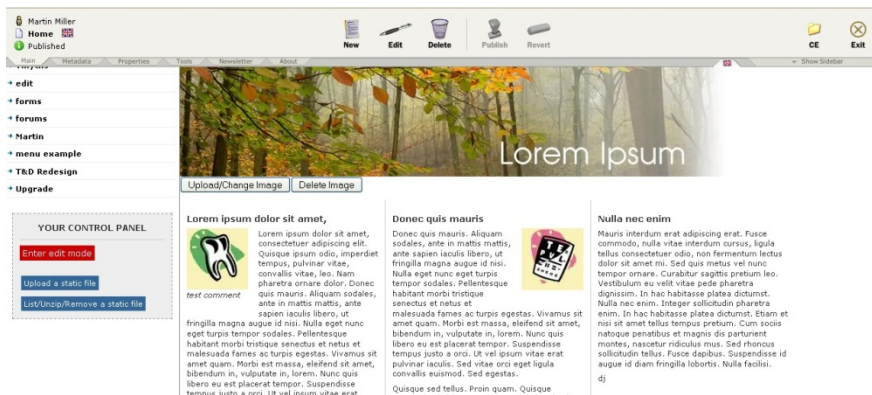
You may need to accept a locally created security certificate.

Once you have done so the login dialog box appears:



For TRAINING enter the User Name and Password provided by the trainer.

When you are working in your own site (Test or Production) enter your UAUsername and ID (the same as for Google Apps for Education).



Your site will open in Edit mode.

Create a New Page

For this class you will create three new pages in the training/newsite/ directory



Click the [New] icon

The Create Page dialog box appears

A screenshot of a "Create Page" dialog box. It has a title bar with a "New" icon on the left. The main area contains the text "Enter a title, and optionally a directory name, for the new page:" followed by a text input field. Below the input field is a breadcrumb trail: "Home > training > Home >". To the right of the input field is a small icon. On the far right, there are two buttons: "Cancel" and "Create Page".

For training please give the first page your first or last name. Your second page should be the name of the form you plan to create (or just Form for this class). Your third page needs to be a child page of your main page, not the form page. Call it View.

When you are working in your own site; Type the title as you would like it to appear, complete with upper- and lowercase letters, spaces etc. The text you enter here will be stored in the page's metadata where it can be changed at any time. The name will also normally be shown in the page header and navigation menus.

A new directory will be created for you, using the page name. This means the name will become a part of the page's URL. Since there are a number of restrictions regarding how URLs are created, Roxen may change the name to ensure it is part of a valid URL. The following changes are always applied:

- **Conversion to lowercase.**

All characters will be changed to lowercase equivalents.

- **Replacing of spaces.**

Spaces and other invalid characters will be converted to dash ("-") characters. Sequences of multiple underscores are also removed.

Publishing a changed page

The "Publish" button makes your changes visible to other content editors and other site visitors (depending on how access permissions have been set up). To publish a page, navigate to that page and click the "Publish" button in the main toolbar tab.

Before the action is performed you have the option of providing a log message. All revisions of a page are stored for later retrieval. Giving a descriptive log message can help you and others to quickly see what change you made and why.

To write a log message, click the "+" icon and enter your text before clicking the "Publish Page" button:



Publish your main page; you do not need to publish the form or view pages yet.

Creating a Form

Introduction

It's easy to create and maintain forms in Roxen Forms and Response. You can create surveys, questionnaires, application forms, order forms and more.

These are NOT secure forms. You may not use them for sensitive information or credit card numbers.

If you need to collect sensitive information contact the Help Desk, they will create a work order with Web Infrastructure for you. This may be a recharge operation. If you need to collect credit card information contact the Director of the UAF Business Office to set up a Touch-Net account.

Features

- Text fields
- Single and multiple choice selections: radio buttons, drop down lists and check boxes
- Mix with other components, such as Text & Picture
- Multiple pages with page breaks
- Require answer
- Default answer
- Component based, easily edited from the Insite Editor
- Responses are stored in an SQL database
- E-mail responses
- RXML scripting:
 - Dynamically fill in default values
 - Flow control — disable questions and skip pages
 - Custom validation
 - Custom e-mail
 - Calculations
- View list of responses and single responses
- Export responses to other applications such as Microsoft Excel
- Mark responses as deleted in the database, purge later
- Share responses between Edit and Acceleration servers

<p>Note: RXML scripting is done by Web Infrastructure, and is a recharge service. All features may not be available due to our environment.</p>

Creating the form

Navigate to your form page.

Insert a standard Text and Picture component.

This component should have the purpose of the form, special instructions, special information your site visitor needs to fill out the form.

Insert Form: (element name) as appropriate for your questions. You may make a form field required. If you do; make sure you tell your site visitors. Roxen does not indicate that a field is required until AFTER you try to submit the form.

Other components, such as "Text & Picture", can be used on the same page to provide information. To split a form into multiple pages, insert "Form: Page break" components. Finish the form by inserting the "Form: Submit" component.

The screenshot displays a web form editor interface. On the left is a vertical toolbar with various components: Header, Form: Selection, Form: Text, Form: Text, Form: Text, Form: Submit, Text & Picture, and Footer. Each component is preceded by an 'Insert' button. The main area shows a preview of a 'Contact us' form. At the top is the Roxen logo. Below it is the title 'Contact us'. The form contains a dropdown menu for 'Please select subject', followed by text input fields for 'Full name' and 'E-mail', and a larger text area for 'Message'. A 'Submit Query' button is at the bottom of the form. Below the form, a message reads 'Thank you for your message!'. At the very bottom, a timestamp says 'Administrator 15 April 2005, Friday 09:55'.

Note: questions in form labels cannot contain the / character. Use the word or.

Components inserted after the "Form: Submit" component will be displayed after the form has been submitted. No "Form" components are allowed after "Form: Submit".

Insert a Text and Picture element after the submit button.
The content will display after your site visitor submits the form.

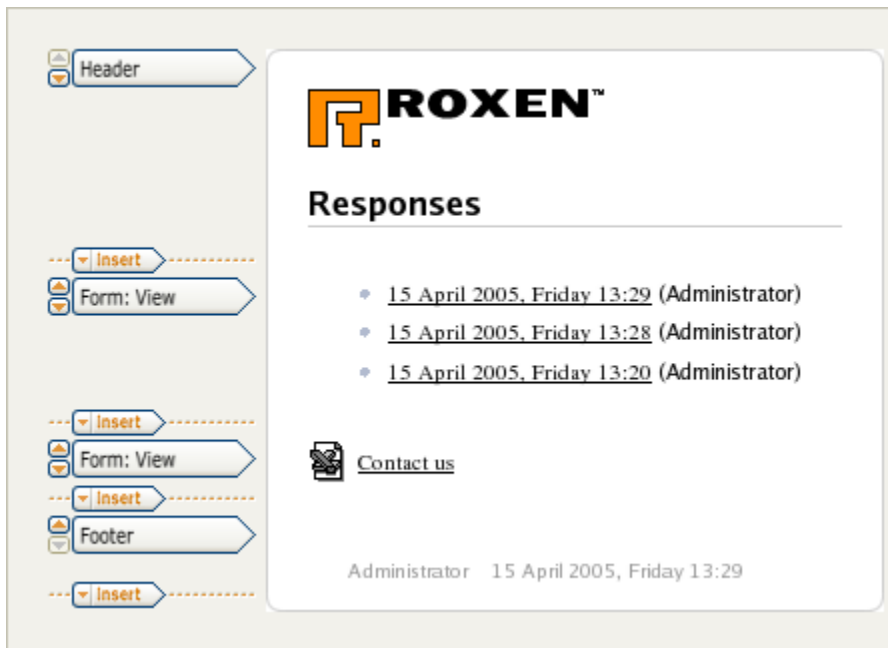
Viewing, exporting and deleting responses

Viewing and exporting responses

Edit the page where you want to view the responses.

Navigate to your View page. The page must not contain a form. Insert the "Form: View" component. The "Form link" setting is the path to your. You can have several "Form: View" components on the same page. To export the results to a table format compatible with applications such as Microsoft Excel, use the "export" variant in the component.

To view single responses, exit the page editor and click on the links in the form view list.



Deleting responses

Delete a response by viewing it and clicking on the link "[Delete this response]". Write access to the forms page is required. Deleted responses are only marked as deleted in the database. A response can be undeleted by removing the corresponding delete mark in the

Content Provider
Editing

database manually. Deleted responses can be permanently purged by clicking on the "Purge" button in the "F&R: Submit" module in the Roxen Administration Interface.

Depending on your specific account permissions you may or may not see the "undelete" or "Purge" button.

Menu editing overview

This section is for the left side menu in the standard templates.

The site navigation interface is built automatically for you when you add or remove pages, but you also have the option of customizing menu entries. You can change the sorting order, add links to external pages, or hide one or more entries from site visitors who are not logged in.

Each page contributes to a separate part of the total menu structure. Thus, the menu editor will present those menu entries which appear as immediate children to the page in question. These sub-menus are stored in individual XML files throughout the site and are normally only accessed through the graphical editing interface.

Each menu is built around one or more of the following parts:

Menu Entry

An entry which refers to a sub-page to the current page.

Menu Link

Custom URL which can point to internal or external pages.

Menu Divider

A horizontal divider line for cosmetic purposes.

Menu Remaining

A placeholder for all menu entries which have not been individually configured.

Relationship between pages and menu entries

Look at the page “Menu Example”. Menu Example is the parent page, or top level in the site. The child pages are:

Example ·UAF ·UAA ·UAS ·SW
--

By default, when you create the child pages they are sorted alphabetically. The names are taken directly from the page titles for each sub-page. If you open this menu in the menu editor you will see that all existing entries are combined into one "Menu Remaining" part, i.e. the placeholder for menu entries which so far hasn't been individually configured. This part is dynamic in that new sub-pages will be added and removed as needed when you create or remove them.

You may want a different order, to have some pages not appear in the menu, or to add different menu choices. This involves splitting the "Menu Remaining" part into separate entries which can be placed individually. You can move menu parts up or down and set visibility for each part. Note that hiding parts only takes effect on published pages and not inside the editing environment (otherwise you wouldn't be able to navigate to the pages referred from the links while in editing mode). You will still see menu choices in EDIT mode that do not exist for your site visitors.

Using the menu editor

Make sure you are on your main page.

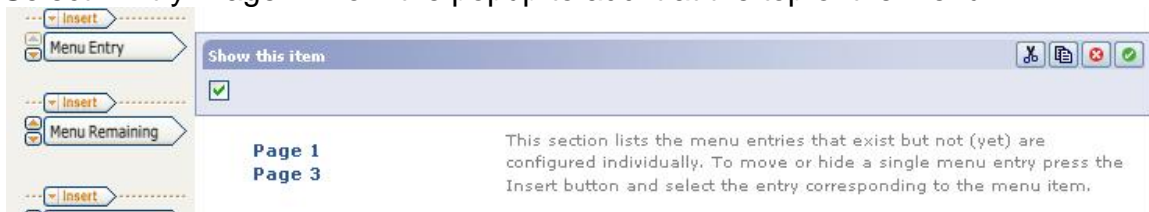
Next, open the editing toolbar and click the "Properties" tab.

The menu should show as Default. Click on the "Menu" button and you will see the editor pictured below:

Using the "Insert" popup menu you can now add a divider, a link or any of the pages listed in the "Menu Remaining" part. If you choose one of the latter, that particular item will be removed from the "Menu Remaining" part. Likewise, deleting an individual "Menu Entry" part will send that page title back into the part for remaining items.



Select "Entry: Page 2" from the popup to add it at the top of the menu:



Click the green check mark icon to finish the selection.

Your menu will look like:



Click the arrow buttons in the left column to rearrange entry order. When you are happy with the order, click the save menu button.

Your menu edit will be automatically published.

Menu Entry

You may set visibility, and the entry can be deleted.

Menu Link

You may set the link title, link URL, frame target and entry visibility. The link can be deleted.

Menu Remaining

The visibility can be set.

Menu Divider

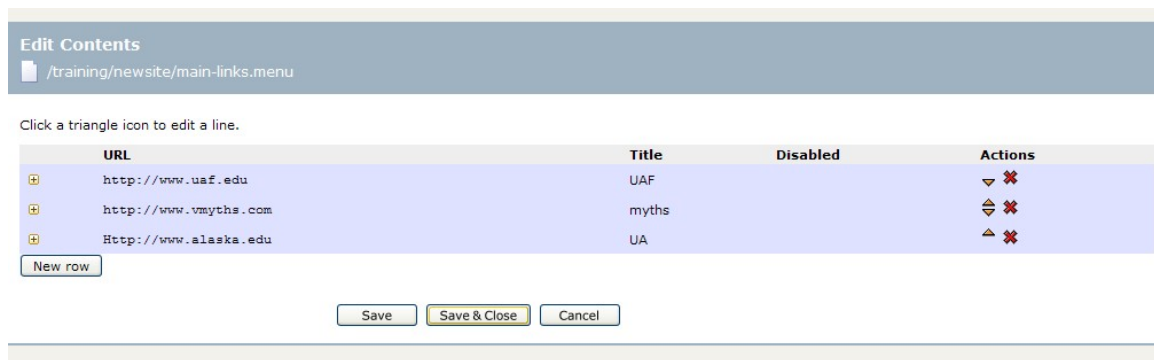
You may specify an optional label and select a line style (e.g. solid or dashed), and the divider can be deleted.

Editing the Top Menu

This menu is edited using the Content Editor interface.



Click the Edit Menu button



Click the New Row button



Type the target page in the URL field. Use a relative reference for targets within the Roxen repository. Use a fully qualified (Absolute) reference for targets outside the Roxen repository.

You can keep adding new rows as needed.

You can use the promote and demote arrows on the right side of the menu to change the order of your links. The top link is the leftmost when your site visitors see your page.

You can delete an entry using the red X icon on the right.

Click the Save and Close button when you are done.

You will be in the Metadata view of the main-links menu.

The screenshot shows a web management interface with a top navigation bar containing tabs for Files, Access Control, Search Engine, LogView, Configuration, and Docs. Below this is a breadcrumb path: / > training/ > newsite/ main-links.menu. On the left side, there is a vertical menu with icons and labels for File, Edit, View, Versions, and Admin. The main content area displays the metadata for the selected menu item.

You	Site	Name	Last Change
		main-links.menu	Today, 12:29 p.m.

This item exists in your edit area and you have made changes to it which aren't committed to the site.

Metadata

Type	Menu
Use as Stationery	No
Category	No category
Externally Visible	Always
E-mail Notification	No notification
Author	Aida de l'Isle

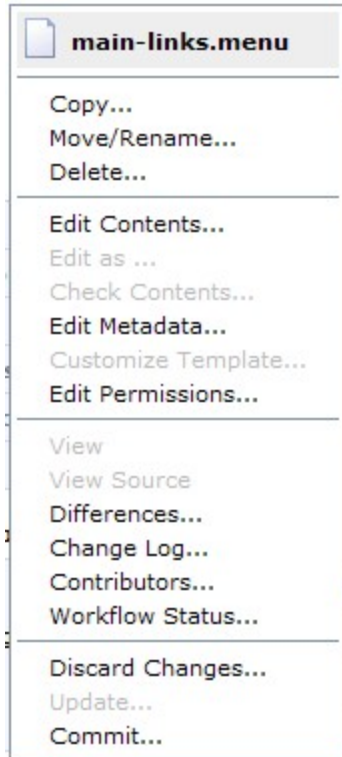
Language-dependent metadata

	Size	279 bytes
Any language	Title	
	Keywords	
	Description	

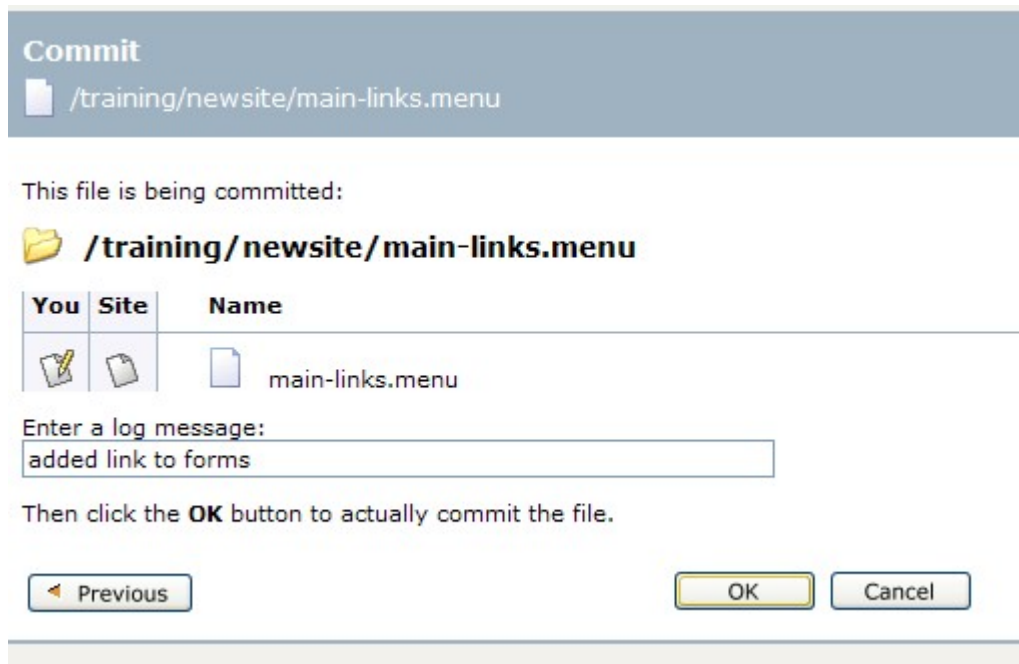
Preview

URL	Title	Disabled
http://www.uaf.edu	UAF	
http://www.vmyths.com	myths	
Http://www.alaska.edu	UA	
/training/newsite/forms	Training Forms	

Click the Versions button to bring up the Action Menu



Click the Commit option (from the Content Editor Commit = Publish).



Enter your Log Message and click the OK button.

The screenshot shows the Roxen CMS Insite Editor interface. The breadcrumb path is / training/ newsite/ main-links.menu. The main content area displays the metadata for the selected item.

You	Site	Name
		main-links.menu

This item only exists in the site.

Metadata

Type	Menu
Use as Stationery	No
Category	No category
Externally Visible	Always
E-mail Notification	No notification
Author	Aida de l'Isle

Language-dependent metadata

Any language	Size	279 bytes
	Title	
	Keywords	
	Description	

Preview

URL	Title	Disabled
http://www.uaf.edu	UAF	
http://www.vmyths.com	myths	
Http://www.alaska.edu	UA	
/training/newsite/forms	Training Forms	

You will be in the Metadata view for your main-links menu.
Click the UP Arrow to go up one level in your site repository.

The screenshot shows the Roxen CMS Insite Editor interface with the file repository view. The breadcrumb path is / training/ newsite/. The main content area displays a list of files and folders.

You	Site	Name	Size	Last Change	Title
		about/			
		archive/			
		main/			

Creating a Form

Click the Insite Editor button to return to the Insite Editor view of your site.

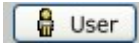


Once Roxen has refreshed you will see the changes you made to your menu. Remember it may take up to 3 minutes for the menu to refresh.

Log Out of Roxen

Make sure you have saved and or published any changes you made during your editing session.

Click the **[User]** button



The following dialog box appears

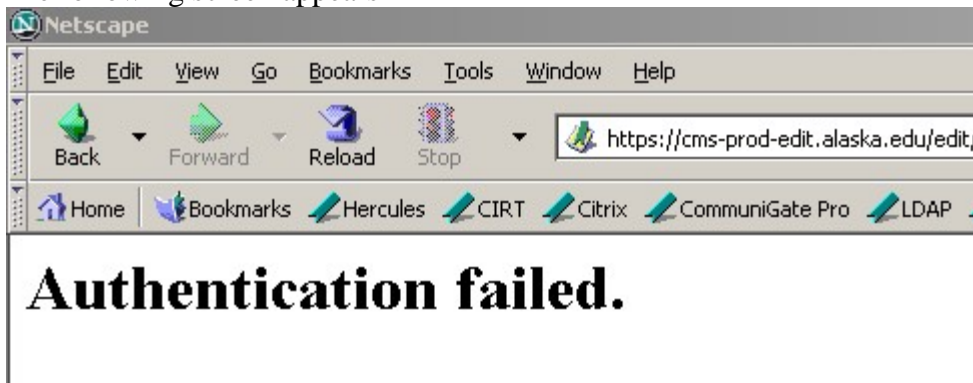


Highlight the **User Name** and press your **[Enter]** key

Click the **[OK]** button

Click the **[Cancel]** button

The following screen appears



You are properly logged out.

The only other way to log out is to close EVERY tab and window in the browser you have been using to edit your site.

Glossary

Page

A page contains a number of content components (see below) and has a place in the site hierarchy.

Editing a page

When editing a page you insert new content components or remove or change existing components. In the context of this manual, editing always refers to changing the information on a page, and never its design or visual features.

Publishing a page

When you publish a page you make it available for viewing by visitors to the site. Until you decide to publish them, changes you make are only visible to you.

Reverting a page

When you revert a page, you undo all the changes you have made to the page since it was last published.

Page components

A Page component can contain text, with or without an image, a table, a link to a file, or a link to another page. One page can contain any number of these components, in any order. There are also header and footer components, of which there can only be one each on any page. News pages can only contain news components, a header, and footer.

Access control

The access control system handles access rights for different users. It ensures that you can only access those parts of the site for which you are authorized. You identify yourself to the access control with your UA Username and Authserv password. These are your personal key to the site, should never be shared, and immediately changed if you suspect that someone else may have learned them.

Where to get help

If Roxen is broken: Call OIT Help Desk – 450 8300.

To have a site created: Call OIT Help Desk – 450 8300. A call ticket will be sent to Core Applications (Core Apps). A member of the Core Apps team will contact you and set up a consultation.

At the time of this publication the Fee for Service has been waived for moving an existing site from either a static server or the current State Wide Roxen server, provided you use out of box templates.

Normal fee for service charges apply for custom template development.

Additional training: Email sytrain@alaska.edu. If the training is within our ability to deliver we will assist you. If you need advanced Roxen training we will contact Core Apps to arrange that training.

Training Documentation:

<http://www.alaska.edu/oit/training/Documentation.xml>

<http://www.alaska.edu/oit/webdev/>

Access to the Various Roxen Systems:

http://www.alaska.edu/oit/sc/about/forms_newdocs/formAccountRequestChangeForm.pdf

Make sure to note the site(s) you need to edit, and if you need access to the Test server.

You need test server access if you are developing a new site.