

Creating a Roxen CMS Web Site

Preparations

Your work in creating a Roxen website begins long before adding content. The first step is a thorough analysis of your needs. If you want help, OIT's Web Development Services (WDS) provides design, development, and support for Roxen sites.

- ✧ Review the websites for Web Development Services (www.princeton.edu/wds) and Roxen support (www.princeton.edu/roxen) for information about the services available to help you create your website.
- ✧ Decide whether you can use a free design theme (see samples at www.princeton.edu/wds/samples) to control the look of your site, or whether you need a custom theme. If you need a custom design or a dynamic module, contact wdsoit@princeton.edu.
- Tip! If you need to get a site up quickly, begin with a free design theme. To change the design later, contact Web Development Services at wdsoit@princeton.edu.*
- ✧ Determine who needs access to your site to review the content and appearance of your site before it goes live, and obtain their NetIDs.
- ✧ Request a free site by filling out the Roxen site request form at www.princeton.edu/wds. Provide the NetIDs of the people who need access to your site, and indicate which design theme you want.
- ✧ Join the roxen-support@princeton.edu mailing list for support from other campus Roxen users as described at www.princeton.edu/roxen/resources.
- ✧ Sign up for the introductory training course through the Employee Learning Center: www.princeton.edu/training

In addition to the technical preparations, you should review these guidelines:

- ✧ The *Guide to Creating Website Information Architecture and Content* available from the Communications Office (click [Information Architecture Guideline](#) on the /roxen/ resources page, and then the link to the Guide on the right side of the Information Architecture page).
- ✧ The University Website Requirements (click the [Standards for University Sites](#) link on the Resources page of the Roxen website).

Analyze Your Content

The primary part of your preparation and planning stage is analyzing the information. Keep in mind that your users are looking at your pages with a specific goal in mind. The more you remain focused on what their goals might be, the more they will appreciate your site. Analyzing your content falls into two major categories:

- ✧ Determining what needs to be included
 - Identify your users.
 - Identify the information they are looking for—interviews are a good way to make sure that you really understand what your users want.
 - Identify the information you want to deliver—analyze the content you already have (print and web) and decide which pieces will be useful to your users. Also look for new information that you may not already be providing.
- ✧ Organizing it for easy access
 - Group your information according to who needs it.
 - Group your information according to what they need it for.
 - Create a site map and/or navigational outline.
 - Create labels that will serve as menu items.

The *Guide to Creating Website Information Architecture and Content* includes helpful techniques for analyzing your audience and your content. It is highly recommended that you take the time to complete these exercises. Your website will be the better for it. If WDS is helping with design and development of your site, they can also help with analysis.

Create Your Pages and Add Content

Pages in Roxen are not simple HTML pages. Instead, they are combinations of components that are managed by the Roxen content manager. The most frequently used components include:

- ✧ The Text and Picture component for text alone or for text paired with a single image. You can also place text in a Text and Picture component in a sidebar.
- ✧ The File component to upload and link to a file.
- ✧ The RXML component to include raw code.

- ✧ The Core Horizontal Rule component to add a separator line between components. (You can also add a horizontal line with a Text and Picture component.)

Other special components allow you to add an RSS feed, forms, news, links and drop-down link lists.

Once you create a component, you can link to it, copy it, and paste it into any other page in your site.

You can control who can access pages in your site and when pages become visible. You can also control how items appear in your menu, and customize the banner image.

Working on Your Edit Site

You will make changes to your website in an edit area on www-dept-edit.princeton.edu (or another edit server) and then publish those changes.

There are two editing environments:

- ✧ The Insite Editor, displayed when you enter edit mode, is where you'll do most of your content authoring.
- ✧ The SiteBuilder editor, displayed when you click the **CE** button, is where you can manage files and do other more advanced functions.

Publishing: Until your site is launched, publishing changes only makes them visible to those who have access to read or edit your edit site. After your site is launched, publishing a page makes it visible to everyone unless you have secured the page (see the "Roxen CMS—Beyond the Basics" quick reference card for instructions on securing pages).

Launch Your Site

At least two weeks before your target launch date, email roxen@princeton.edu to request:

- ✧ A site review
- ✧ Redirects to your new site from your old site
- ✧ Links to your site from the University's main website
- ✧ Launch—Making your site visible to the public



Adding Content to Pages

Adding Text to a Page

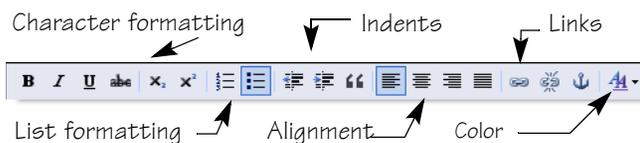
1. Click the **Edit** button in the toolbar at the top of the page to add, edit, or delete any components.



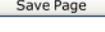
Tip! If this toolbar is not visible, make sure you have clicked [Enter edit mode](#), and that you are on the *Main* tab.

The series of components that make up the page are displayed.

2. Click the **Insert**  tag at the point where you want the new text to appear, and select **Text and Picture** from the bottom of the drop-down list. The Text and Picture component opens with the Text input box centered in the window.
3. If you have multiple Text and Picture components on the page, and you want this component to begin with a subtitle, enter it in the *Title* or *Subtitle* field below the *Variant* field at the top of the component. (The formatting is controlled by your template; *Title* creates an H3 heading and *Subtitle* creates an H4 heading.)
4. Type your text in the text entry box, using any formatting buttons on the formatting (second) toolbar.



5. If you need to include a special character, such as an em dash, a carat, or an accent, position your cursor where you want to insert the character and click the **Insert Special Character**  button (on the first toolbar). Locate the character in the character table and click it to enter it in your text.

6. When you are finished entering text, you can save just the component if you have more work to do on this page, or save the page if you are finished with it.
 - To save the component, click the **Close Editor View**  button at the top of the component.
 - To save the page, click the **Save Page**  button at the top right of the edit window.

Adding Text with a Picture

You can add an inline picture, or a picture with text wrapped around it to the left or right, or with the text below the centered image.

To add an inline picture, use the Text and Picture component, and position your cursor where you want to place the image. Click the **Insert/Edit Image**  button on the top toolbar to upload, select, and insert your image.



After inserting the image, right click on it, select **Image Properties**, and enter *Alternative Text* that describes it.

Tip! Before inserting any images, make sure the picture is the appropriate size for your page.

To add a picture with wrapped text:

1. Insert a Text and Picture component.
2. When the Text box is displayed, scroll up, and select one of the following in the *Variant* field.
 - **Text and picture, left aligned** (the image is on the left)
 - **Text and picture, right aligned** (the image is on the right)
 - **Text and picture, center aligned** (the image is centered above the text)
3. Enter your text, and format it as desired.
4. In the Picture section, click the **Browse & Upload**  button.

5. When the picture browser window opens, click the **Browse**  button to locate your picture.
6. Locate your picture using the File Upload window, select it, and click the **Open**  button.
7. Enter a title for the picture in the *Title* field.

Important! The title is required; it is used as the *ALT* and *Title* attributes, which provide information about the image to software that interprets images for the visually challenged and for Google. It is also displayed when you hover over the image.

8. Click the **Upload**  button to load the image file into your Roxen folder for this page.
9. When a thumbnail of the image is displayed, click the image to insert it on your page.
10. If you want a title to appear on the page under the image, type the title in the *Picture Comment* field.
11. If you want a link on the image, enter the URL in the *Picture Link URL* field.
12. Click the **Save Page**  button at the top right of the edit window to see the text wrapping around the image.

Adding a Sidebar

A sidebar is a narrow column, usually on the right side of the page, where you can add information that is of interest, but is not the primary focus of the page. Because the area is narrow, keep this text brief.

1. Insert a Text and Picture component at the bottom of the page.
2. Select the **Variant Sidebar, Text & Picture**.
3. In the *Title* field, type the heading you want to appear in the sidebar.
4. Enter your text, formatting as desired.
5. If desired, add a picture. By default, pictures are displayed left justified in the sidebar, below the title and above any text.



Creating and Linking to Pages

Creating New Pages

Before creating a new page, make sure you are on the higher-level page from which you want the new page linked.

To create a new page:

1. If you are not already in edit mode, click the [Enter edit mode](#) link at the bottom of the page.
2. If your site already has pages defined, open the page whose menu will include the new page. (You can hide the menu item later, if desired.)
3. Click the **New** button at the top of the window.

Click New



4. The toolbar is replaced with a field where you can enter the name of the page. Type the name you want to use as the title on the page itself. This name will also be used as the name of the folder (directory) that will contain the page (with hyphens replacing any spaces), and as the page title that will appear in the menu.

Tip! Don't use special characters in the name, as they cannot be used in the folder name. You can change the title of the page later, if necessary.

5. If you want to shorten or change the name used for the folder, click the + button at the end of the field, and type the abbreviated name in the folder name field.
6. Click the **Create Page** button. The new page is displayed, with the name you entered as the page header. You are now ready to add content to the page.

To change the header on the page:

1. Click the **Edit** button on the toolbar, or hover over the header and click the **Edit** tag when it appears.
2. When the Edit page opens, the Header component is open, and the *Title* field is blank. Type your new header in the *Title* field.

3. Save the component, if you have other changes to make on the page. Save the page if you are finished with this page.

Adding Text Links to Web Pages

You can link to web pages within your own site, or outside your site. To add outside links to the menu, see “Customizing the Menu” on the Beyond the Basics quick reference card.

1. Click the **Edit** button on the toolbar, or hover over the component that includes the link text and click the **Edit** tag when it appears.
2. In the Text box, select the text that will be the link text.
3. Click the **Link** button on the toolbar. A new window opens showing your current page.
4. **To link to web pages on your own site:**
 - a) In the new window, navigate to the page on your site to which you want to link.

To link to outside web pages:

- a) Open a new window in your browser and navigate to the page you want to link to. Copy the URL from the address bar.
- b) Paste the URL in the *Link URL* field, and click **Goto URL** to validate the link.

Tip! If you know the URL, you can just type it in the *Link URL* field, rather than copying and pasting it. Make sure that you include the `http://` at the beginning of the URL. Links to pages within your site can begin with a forward slash (`/`) since `http://www.princeton.edu` is understood.

- c) If you want the new page to open in a new window, select **Open in new window** in the *Link target* field.
5. Click **OK**. The selected text is now a link.
 6. Save the component, if you have other changes to make on the page. Save the page if you are finished with this page.

Uploading and Linking to PDF Files

There are two ways to upload and link to a PDF file.

- ✧ If the name of the file is self-explanatory, you can use the File component to upload and link to the PDF file.
- ✧ If you want to include the link in a text component, you will have to upload the file separately, and then link as you did to the web pages.

To upload and link using the File component:

1. Click the **Edit** button on the toolbar.
2. Locate the component after which you want to insert the link, and click the **Insert** tag below it.
3. Select **File**.
4. Type the link text for the file, usually the name of the document, in the *Display name* field.
5. Click the **Browse & Upload** button. The File Browser window opens, showing any files you have already uploaded, and any folders under your current folder.

Tip! If your file has already been uploaded to this folder, it will appear in the list, and you can click the filename to complete the link.
6. Click the **Browse** button, and navigate to your file.
7. Select the file and click **Open** .
8. Click the **Upload** button to upload the selected file.
9. When the file name appears in the list of files, click the name to select and link to the file.
10. If you have other changes to make on the page, save the component. If you are finished with this page, save the page.

Note: The **Standard Variant** displays a PDF icon, the size of the file, and the modification date of the file. You can suppress any of these by selecting a different variant.

Uploading Files in CE, and Publishing

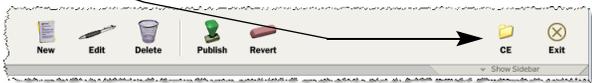
Uploading Files in CE

If you don't want to use the File component to link to a file, you must upload the file in the Content Editor's SiteBuilder editor (CE) before you can link to it. To access the SiteBuilder Editor, click the **CE** button on the Main toolbar.

To upload files in CE:

1. Open the page where you want to insert the linked file, and click the **CE** button on the Main toolbar.

Click CE to access SiteBuilder



The SiteBuilder Files tab opens by default, showing your site's folders and files. The breadcrumbs will indicate that you are in the folder for that page.



2. Click the **File** button and select **Upload New File** from the drop-down menu.
3. On the Upload New File page, click the **Browse** button to open the File Upload window, where you can locate and select your file.
4. Click **Open** to select the file and return to the Upload New File window.
5. Click **Next**. Notice that any spaces in the filename have been replaced with hyphens.
6. If you want to change the filename of the uploaded file, type over the suggested name, making sure to leave the correct extension. Remember the file name.
7. Click **Next**, and then **OK**.

For image files, add an Alt tag by clicking the page  icon next to the file, selecting **Edit Metadata** from the drop-down menu, and entering the Alt text in the *Title* field.

To commit the file:

8. Click the page icon with the down arrow  next to the file name, and select **Commit** from the drop-down menu.
9. On the Commit page, type a brief explanation in the *Enter a log message* field, and click **OK**.

To link to the file:

1. Click the folder name on the breadcrumbs in CE, and then click the **Insite Editor**  button.
2. Open the component where you want to place the link.
3. Enter the link text, select it, and click the **Link**  button.
4. A new window pops up. In the *Link URL* field, type the name of the file at the end of the displayed URL.

Important! The file name is case sensitive. You **must** use the same case as the name displayed when you uploaded the file.

5. To verify that you've entered the name correctly, click the **Goto URL**  button. The URL of the file will be displayed as a link.
6. When you are satisfied that the link is correct, click **OK**.
7. If you are finished with the page, save the page. If you have further changes, in other components, save the component.

To update an uploaded file:

1. In CE, locate and select the file you need to update.
2. Click the **Edit** button on the left, and select **Upload Contents**.
3. In the Upload Contents window, click the **Browse** button to locate and upload your changed file.
4. Click **Open**, and then click **OK**. The filename will not change, but the content will be your updated file.
5. Commit the changed file, as described above.

Publishing Pages

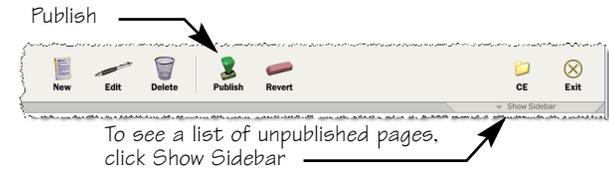
When you have completed all the changes, and are ready to make the page visible to reviewers, or to your live site, you must publish the pages.

Tip! To see all of your changed pages, click the *Show Sidebar* drop-down.



To publish a page:

1. In edit mode, open the page you want to publish, and click the **Publish** button.



2. Click the **Publish Page**  button.

To go back to a prior version:

1. With the page open in edit mode, click the **Revert** button on the top toolbar.
2. On the Revert header, select the version of the page from the list of published versions. The versions are listed in reverse order by date and time.
3. Click the **Revert Page**  button.

Tip! The versions remain in the list, even if you revert to a prior version. You can revert back again, if necessary.

To leave edit mode:

To see what your site will look like, click the **Exit** button at the far right of the Main toolbar. If you have unpublished changes, you will be prompted to publish them.

Tip! If you are not yet satisfied with your changes, or don't want them to appear on your live site yet, you can exit without publishing. You will not lose your changes.