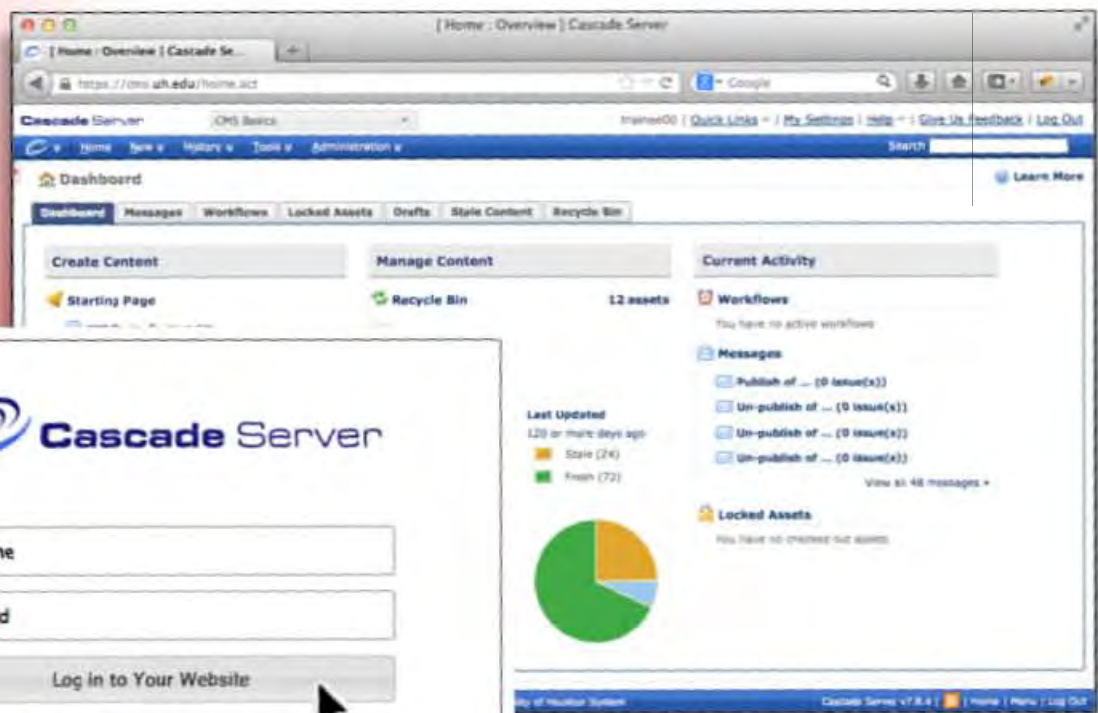


CMS Basics Training Cascade Server



Cascade Server

Username

Password

Remember me

- 1..... **Introduction:** System Requirements: Getting started, The training area
- 2..... **The Home (Dashboard) Screen; The Cascade Menu**
- 3..... **Finding your site inside the CMS; Viewing files & folders – the Asset Tree**
- 4..... **Asset Tree panel vs. View panel information**
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Introduction

What is the CMS?

The CMS, or the UH Website's Content Management System, is a browser-accessible, web-based piece of software used to create, update, and manage web content, without the need for contributors to learn in-depth programming, languages, or page code (such as PHP, HTML, CSS, etc.). This allows non-technical individuals to contribute to the web. The CMS also allows all contributors to better manage their web sites within the framework of built-in university organizational identity, graphic standards, and functionality.

The Content Management System used for the UH website is Hannon Hill's Cascade Server. For more information about Hannon Hill and Cascade Server, visit their online *knowledge base* at: <http://www.hannonhill.com/kb/> <https://www.hannonhill.com/cascadecms/8/kb/>

For more information about how UH websites use the CMS, please contact either Web Services (cms@uh.edu, webservices@uh.edu) or Web Marketing (webmarketing@uh.edu)

System Requirements

The CMS user interface is web-browser accessible, offering excellent cross-platform availability. It is supported by most major up-to-date browsers, including Internet Explorer on Windows and Netscape/Mozilla/Firefox on Windows, Mac, Linux, and Solaris. Early versions of Safari on Mac are supported for all features except the WYSIWYG Content Editors. (See also - note on IE-11, p.37)

Getting Started

For the UH Website CMS Basics training you will be working within a training site. This is an area which is separate from other live CMS sites. You will be able to use the training area to learn how to find your way around the Cascade interface and to practice content creation. Please note that the final Publishing features are not enabled in this area, and we do not preserve what trainees create here; however, it should give you a very true "look and feel" to help you learn what working on your live site will be like.

- Go to <http://cms.uh.edu/>
- Log into the training area:
 - Use your assigned Username – e.g. [trainee01](#), [trainee02](#), [trainee03](#), etc.
 - And the password: **{will be provided in training}**

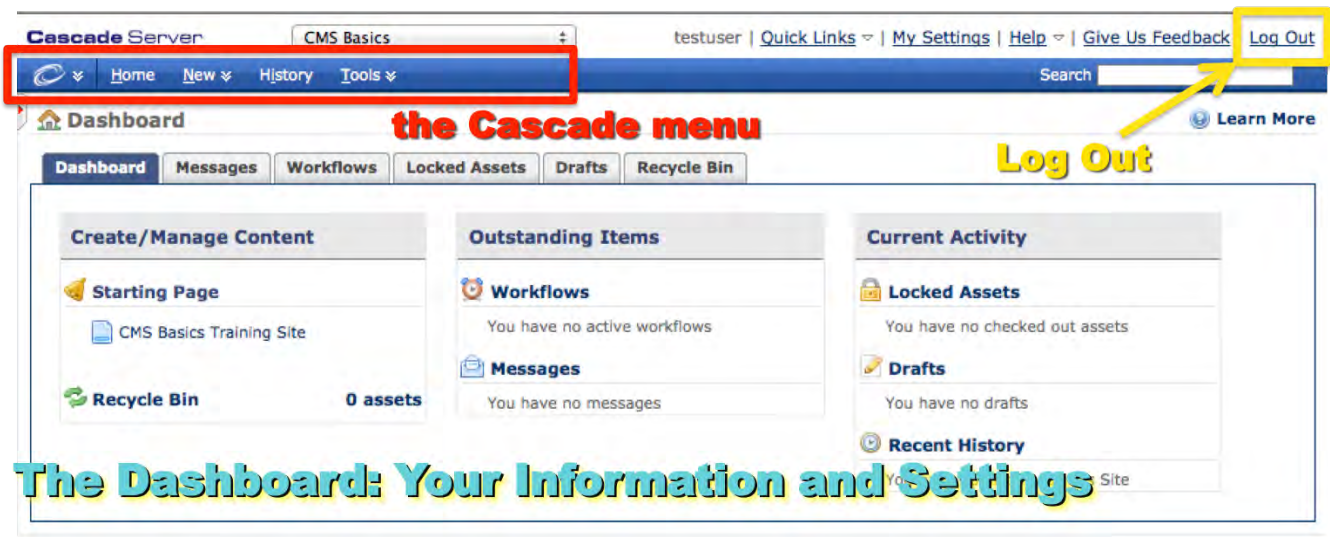
After Training: Once you have access, you will use your CougarNet credentials to login at this same location.

Please note: before individuals can be given access to the CMS, the principal content owner for each website will need to request access for each potential user (each trainee having completed the Basics training). Instructions will be provided during training.

If your area is new to the UH Website, Web Technologies may also be sending your area's content owners a **Site Intake form** to fill out, especially if needed to establish a website account, but also to outline what is wanted for the new site. Web Technologies can go over available options for a site and explore whether any further customization is needed. Once approved and finalized, Web Technologies will set up and test the basic elements for your CMS-based site, and you will then be able to begin the work of migrating, and/or developing and creating your content.



The CMS Home or 'Dashboard' Screen



The Dashboard: Your Information and Settings

After logging in you should see a screen similar to the one above, also known as your "Home" or "Dashboard" view. Depending on variations in how your final login is configured, how your site is set up, or what exact version of Cascade is currently in implementation, what you see here may vary. The basic features and functionality of Cascade described in this training should still be valid – however, if when you are working within your site something is not working for you as expected, please contact the UIT Web Technologies group for assistance. (see also: p.37 upgrade notes)

The Cascade Menu



Various options are available under the Cascade swirl logo, including **Publisher queue**, **Search options**, and **User preferences**. From the rest of the menu bar there are also:

Home – "Home" returns the user to their "Dashboard" view. From this view, the user can see information about their session. Typically, you may see a links to your Starting Page, recent history (pages/assets visited), any associated Content Wizards, Active Workflows, current list of Messages, list of locked assets, etc.

New – "New" opens a contextual menu that allows users to add, upload, or create content for their site, such as adding new Standard Content Pages, uploading various types of Files, etc.

History – "History" is a linked list of the latest items a user has accessed or visited, so you can use this as a shortcut to get back to recently visited locations.

Tools – "Tools" offers contributors a "Zip Archive" feature useful in uploading large numbers of files (which have been compressed into a .zip file) into the CMS at one time.

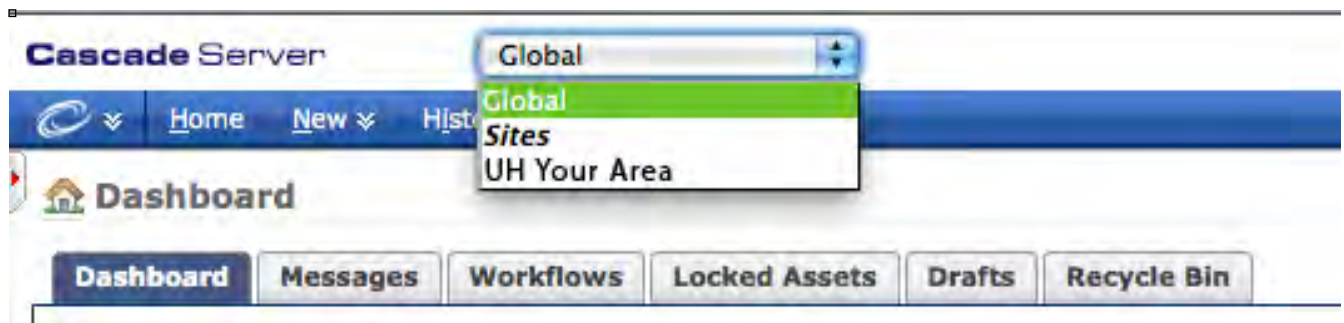
Help – "Help" allows the user to access the online Cascade Server User's Guide as well as a User Forum. For additional information about Hannon Hill Cascade server, you may wish to visit the public Hannon Hill Knowledge Base: e.g. <http://www.hannonhill.com/kb/glossary.html>

Finding Your Area's Site

Upon login, if you have access to a single website, the CMS should drop you directly into your site; otherwise, you may need to use the site-selector popout to navigate the site you want.

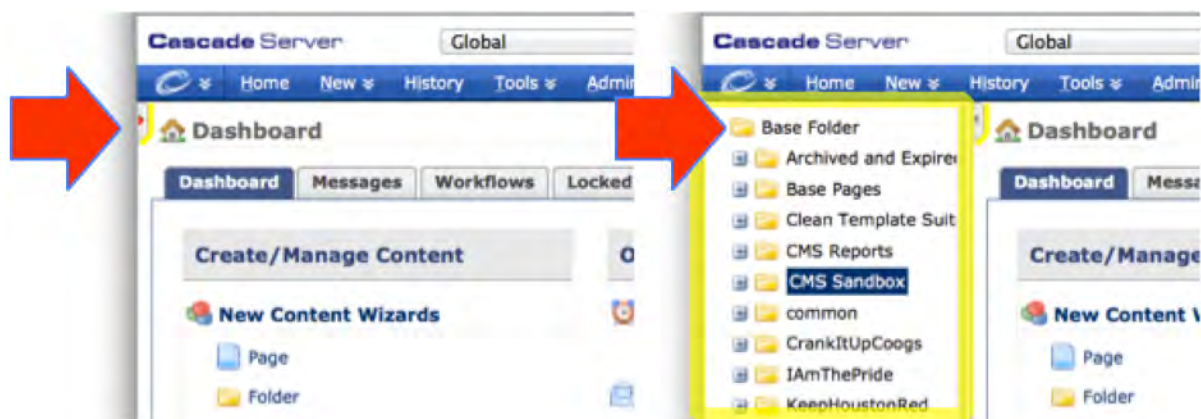
Please also be aware that the CMS has two general areas where website materials can reside: the original **Global area**, and the newer **Sites area**. If your CMS-based website was created prior to Fall 2012, the materials were originally created in the Global area. Subsequently, most websites have either been created directly in the Sites area or have been migrated out of Global and into Sites. However, some materials may still reside in Global. (*Note: With the upgrade to Cascade version 8, Global will go away.*)

So, if you see a "pop-out" menu at the top of your screen, you will access your area in the CMS by first selecting from there, then navigating as usual through the asset tree to find the area you need to edit:



Viewing Your Site – Files and Folders – The Asset Tree

The Cascade CMS uses files and folders to organize web content in much the same way as your personal computer uses them to organize your own materials. To view (or hide) these files and folders in the CMS, just click the tiny tab at the upper left corner of the home screen:



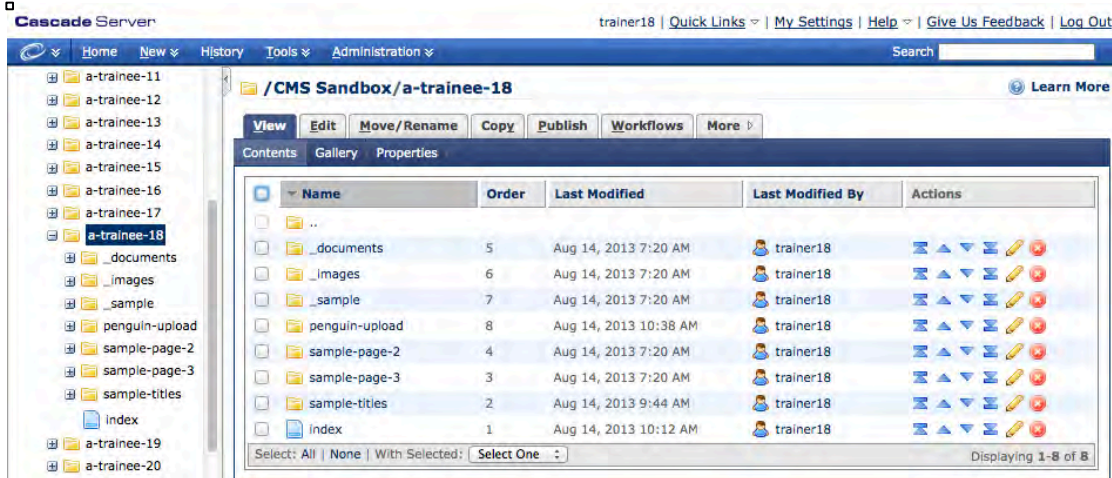
The left-hand-side panel which opens out is known as the “asset tree” / folder-file view / explorer view.

As you work within the CMS you will see that much of the interface contains interlinking and shortcuts to help you find your way around and to work quickly. As you become familiar with the multiple ways to access features, you'll become comfortable with choosing the ones that suit you best.

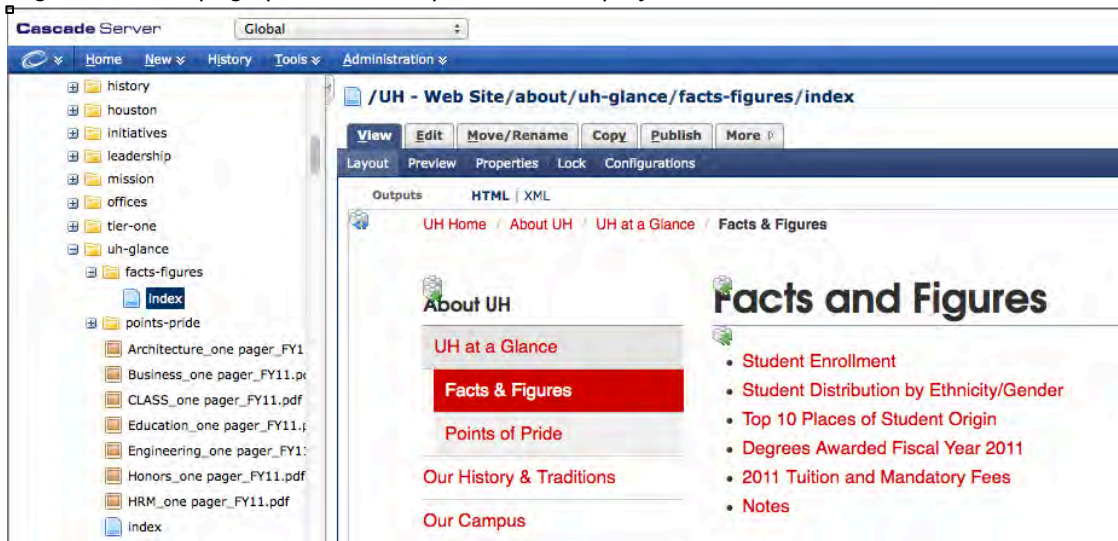
Asset Tree Panel vs. View Panel Information

With an item selected in the left-hand Asset Tree Panel, the information about it and options available for it display on the right-hand side of the page. Some Examples:

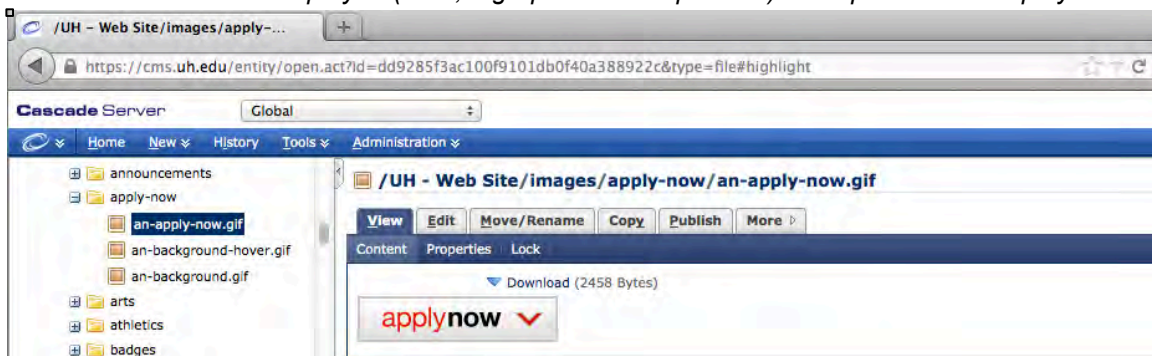
Folder selected – folder-content info and options tabs displayed:



Page selected – page preview and options tabs displayed:



File selected – file info displayed (here, a graphic with its preview) and options tabs displayed:



CMS Asset Types/Asset Factories

Before attempting to edit or create new Folders, Pages, and Files (*also referred to as “assets” within the CMS system, and thus are created by choosing the appropriate “asset factory” from the Cascadebar’s New Menu*), the site contributor should understand what types of assets are available for their area and how the assets relate to one another.

Some of the most common Asset types:

Folder

Folders (aka Directories) are used to contain and organize other assets within your site. The use of nested folders allows the CMS to follow principles of inheritance in dynamically managing your site structure. For example, when the CMS builds a page's **left-hand navigation menu** (a type of 'indexed list'), it uses the **Title text** from the parent folder for each respective page, and automatically includes menu items based on their relationship to the page on display. The CMS also builds the web addresses (URLs) for your site's interior pages by stringing together **folder system names** hierarchically, e.g. from site root down to the displaying page's parent folder. Thus, arranging your folders allows you to define your site structure and navigation. Folders should be organized and/or nested in such a way as to make it easy for your site visitors to navigate around. Use small manageable groups, sticking close to about five or fewer subfolders for any given section.

Folder with standard Content Page →

The *standard content page* represents the most typical kind of page in the UH website. This asset factory creates the two assets together – a parent *Folder* with its child *Page* inside – because they are designed to work together as a single, complex asset. The default **system name** for the page is “index” – and it should be left with that name in order to allow file-management defaults within the CMS to work smoothly. Any descriptive information should be assigned to the Folder, either as a **system name** (think URL) or as its **Title** text (think Left Nav Menu). Note that within the CMS page assets do not yet have a file type, and so remain without a file extension. The CMS will only append the file extension as it constructs and publishes-out the final webpage. UH web pages are set to publish out as “.php” files; thus, “index” => “index.php”.

See also important notes about system name requirements: pages 11, 22.

File (Images, PDFs, Word/Docs, Excel, HTML, CSS, etc.)

Files are usually supporting materials for your site (e.g. downloads or images) or may represent site resources which do not directly appear within Standard Content Page formats. File-type assets are materials introduced into the CMS via either the New=>File asset factory or the Zip Archive tool. File-asset system names need to include their correct file extension (examples: *.pdf, .jpg, .css, etc.*)

Folder with Redirect – Physical Page →

This asset factory creates a *Redirect - Physical Page* at your specified location within your site. and allows you to include in your navigation menu a page which is not a Standard Content page (e.g. *an .htm file*), or which was not created inside your CMS area. It can also allow you to call one individual page from multiple places within your site, without having to keep duplicating the page itself and editing them all separately when content later changes. *Just tell the Redirect what internal or external (requires a URL) page to look for (uses PHP scripting in order to initiate a server side redirect).* These assets do not display a WYSIWG preview within the CMS. When LIVE, selecting this menu item will send the site visitor to whichever page you designated when setting up the Redirect.

UH Webpage Jargon

The following illustrates some of the most common terminology used to describe the various parts (*sometimes aka Regions*) of a typical University of Houston webpage . . .

UH Header

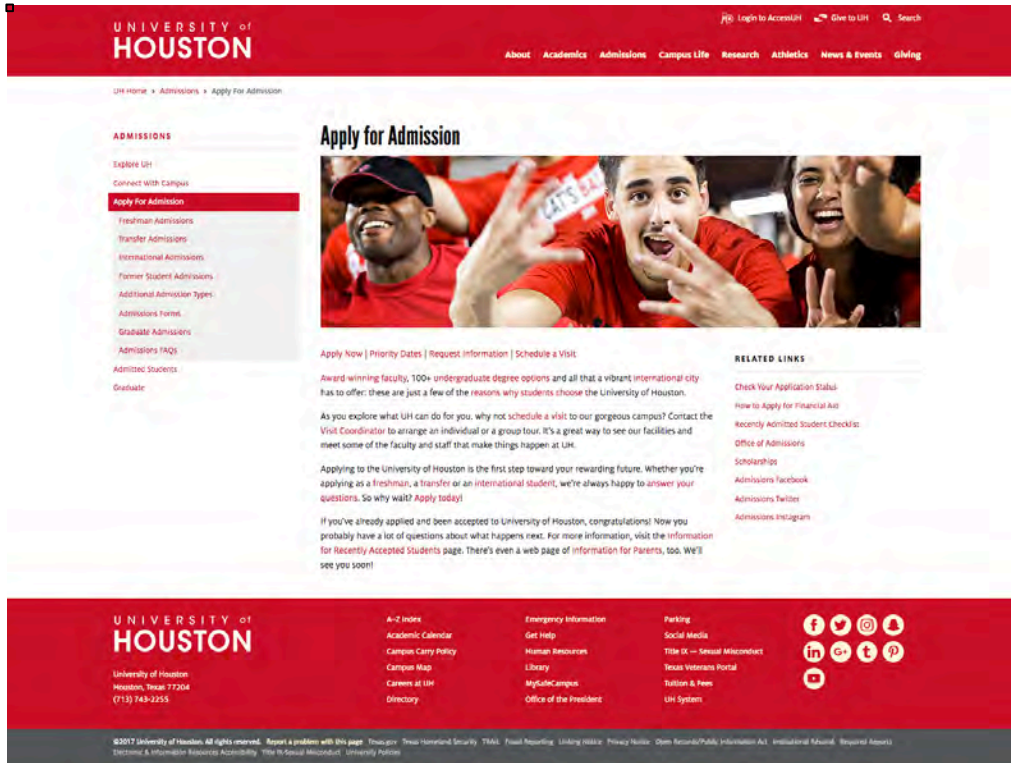
- ① Browser Window Title
- ② Web Address (URL)
- ③ Breadcrumb
- ④ Site/Area Name
- ⑤ Left Nav Menu – left column
- ⑥ Display Name
- ⑦ Main Content Area
- ⑧ A Background Image
- ⑨ Related Links – right column

UH Footer

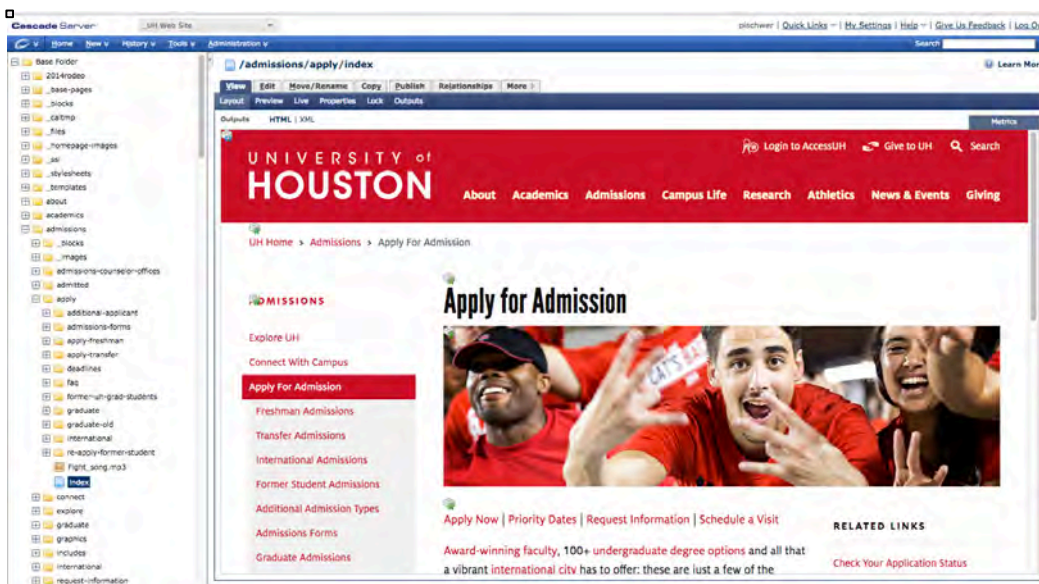
The notes on the following page(s) will help to explain further how various aspects of the CMS can relate to your final web pages and to the organization, structure, and information architecture of your area's overall website.

Whole Webpage vs. CMS View Panel

The CMS stores all the information needed to Publish out whole and entire web pages – including many pieces to which you will have no access (e.g. the standard UH Header, UH stylesheets, etc.). As a Site Editor, you will only be viewing sections of the final page. So, while your site visitor may potentially see something like this . . .



. . . the CMS' Preview will be showing you something more like this while you are editing (if your site uses a custom header/footer you would see that as well):

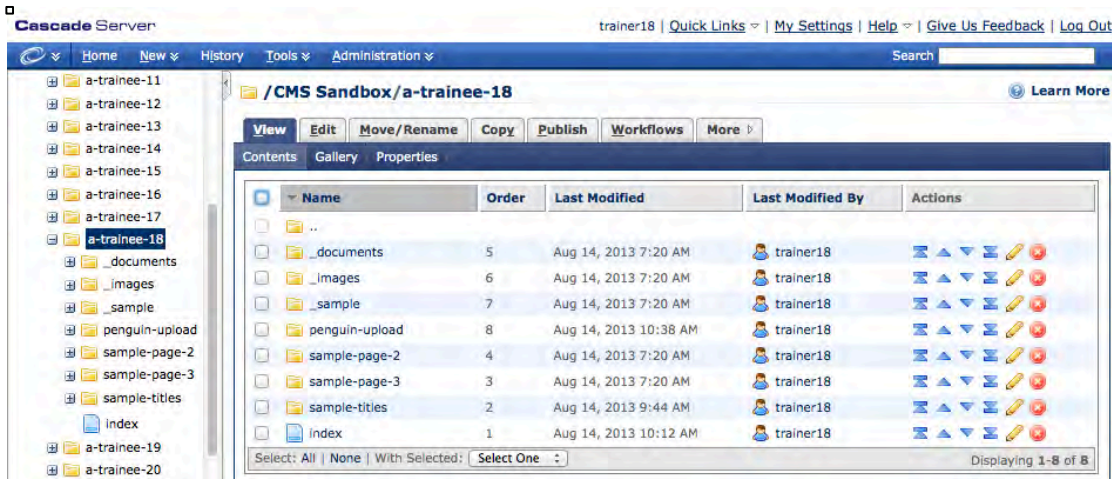


Folder View Panel Information

When you select a **Folder** in the “asset tree”/explorer view on the left side panel, you then see the **View** information about that folder displayed on the right hand side of the browser window, along with any other options that are available to you (such as the **Edit** tab – giving users editing-access to the folder and its associated information).

All information panels also show, at the top, the asset’s relative position/path within the CMS. In the example shown below:

 **/CMS Sandbox/a-trainee-18**



Those items contained directly within the folder will be displayed both under the folder’s icon in the “asset tree”/explorer view on the left side, and in the right-side asset-information panel.

Items on both sides are linked, so you click on any item from either panel – and the CMS will take you there.

From the right-hand side, you may **Edit** the selected folder's information, **Move** or **Rename** the folder, **Copy** it to another location, **Publish/unpublish** the folder, and adjust other options depending on what may be available to you. Deleting the folder may be done (especially after it is first "Unpublished"!) by selecting the **More** tab and then choosing **Delete**. (See more about publishing and unpublishing later in the handout.)

Additionally, this view allows users to change the **Order** of any sub-folders. Because the CMS builds the left-hand navigation menu from information associated with a page's containing folder, you will see that **re-ordering sub-folders directly affects the order of the on-page menu display**, allowing you to override the original order (*i.e. alphabetized by system-name or creation order*) when desired.

To change the **Order** you may proceed in a couple of different ways:

- 1) Click the blue up/down arrows in the "Actions" column; or
- 2) Click the "Order" column header to activate it, then drag the items up or down in the "Name" list

TIP: While you are working inside the CMS, it is actively and dynamically adjusting your whole site for you according to whatever changes you may make. If, for example, you change the order of your left-hand navigation menu, then information about that change is automatically sent to all the pages inside your site which display or "see" the changed item(s). It is sometimes easy to forget that a single change can trigger many (scattered!) changes, so it is helpful to keep in mind that you will need to re-publish ('synchronize') any and all pages which "see"/reflect the change(s). In the case of a "top-level" menu change, your entire site would need to be republished because every page in the site "sees" those top level menu items.

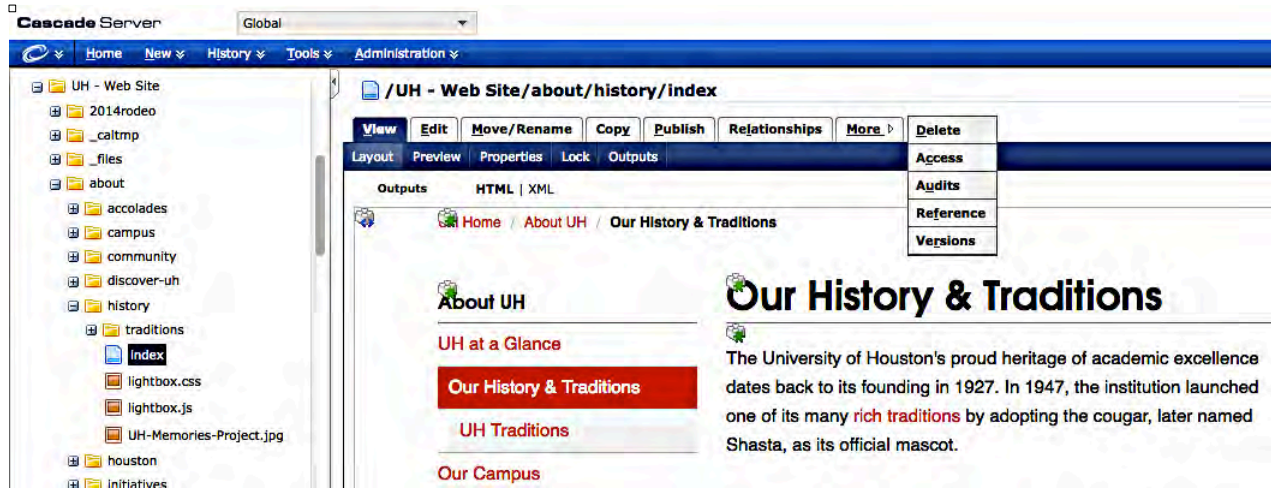
See the sections on creating a new page for additional information about editing Folders

Page View Panel Information

When you select a **Page** in the “asset tree”/explorer view on the left side panel, you then see the **View/Preview** information for that page displayed on the right hand side of the browser window, along with any other options that are available to you (such as the **Edit** tab – giving users editing-access to the folder and its associated information).

All information panels also show, at the top, the asset’s relative position/path within the CMS, and within your site. In the example shown below:

 **/UH – Web Site/about/history/index**



This **View / "Preview Mode"** is the CMS's best attempt at showing you how your page will look and function when it goes live. In this view, with rare exceptions, if something isn't looking like you expect, or working as it should, then chances are you will need to change something.

There are some things about your page which you may not see in Preview mode at all:

- 1) **UH header and/or footer** (especially on non-'customized' pages); and
- 2) **your browser window title bar** (as the CMS interface is already using your browser window).

From the **right-hand information panel**, the options available to you are displayed in tabs.

You may **Edit** the selected page's information, **Move** or **Rename** the page, **Copy** it to another location, **Publish/unpublish** the page, and adjust other options depending on what may be available to you. Deleting the page may be done (especially after it is first "Unpublished!") by selecting the **More** tab and then choosing **Delete**. Also under the "More" tab, you should see a **Versions** option. Within Versions, you may select a previously saved version of a page and reactivate it as the working version.

Please note also that the CMS is "permissions" based. This means how much you see may depend on your level of access. Users without Publishing access, for example, will not see a **Publish** tab.

Please see the sections on creating a new page for additional information about editing Pages.

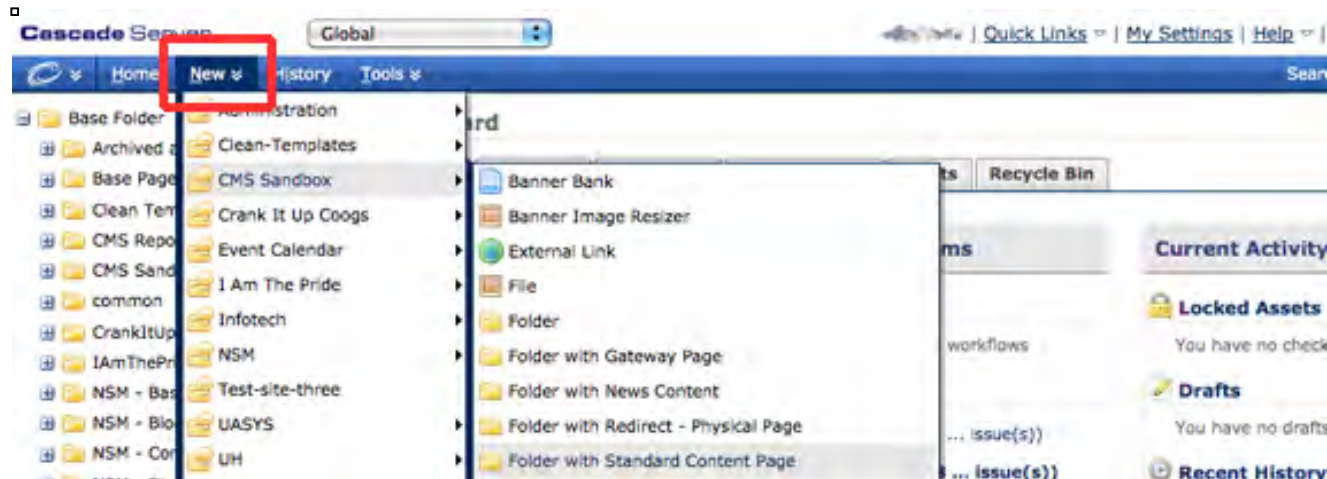
Relationships Tab

New with the CMS upgrade to 7.8.4 is a Relationships Tab for any items which other assets can be linked-to or associated-with. The Relationship Tab will tell you which other assets are linking to/associated with the item you are looking at. This relationship tells you which other assets will need to be republished if the item in question changes. This tab also provides an option to "Publish all relationships" at one time, with these cautions: only those assets the user has permission to see are being included in that list; each of the items listed should be vetted for readiness before publishing the entire set. (*Replaces: "Subscribers" Tab*)

Creating a New Asset

CASCADE MENU >> NEW

New assets can be created by selecting the “New” option from the Cascade menu bar and choosing the particular “Asset Factories” that are tied to your site:



From the “New” option, first select your area (*for the CMS training classes, this will be “CMS Basics”*). You will then see a pop-out menu offering those assets available to your specific area and permissions.

If you see multiple areas, it is important to choose the correct area because this process tells the CMS how to build the new item – i.e. by using the resources which are specific to your site or area. Choosing the wrong area may mean the resulting items will not work correctly, and/or parts of your site could “break” when published.

EDIT >> COPY

New assets may also be created by **duplicating** an already-existing item, using the “Copy” feature available from within the Author-side “Edit” views.

Just remember that the CMS considers each and every copied item to be a wholly unique instance, and assigns each copied item its own ID. This has implications for how various settings and internal links are managed throughout your site during the copying (also moving and renaming) of assets.

For example: when copying a page, any **internal-links** in the original page's **content** will be automatically preserved, and will work just the same within the copied page. However, any other pages or items which **linked to** the original page continue to be linked **only** to that version.

Also, please note that, by default, the CMS **will not** allow an item Copied into its own location to have the same name; and neither will items with the same name overwrite each other (within the CMS) when being Moved. In these cases, an incremental number is added to the original name if the user did not provide anything different.

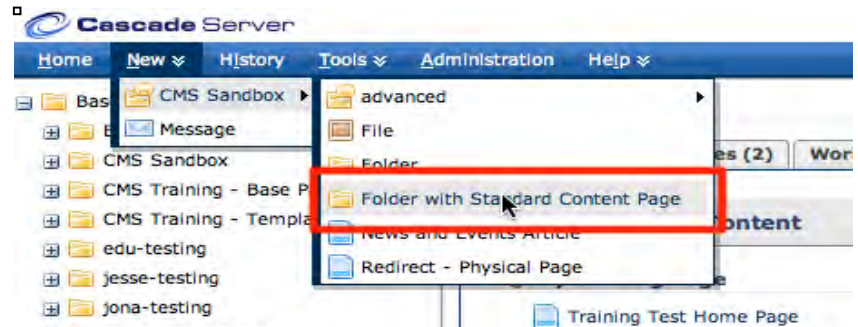
By contrast, the Publisher **will** overwrite items on the server if they have the same name.

TIP: *If you want site visitors to have access to a particular page from your area's navigation menu, but the site structure means your local menu would not ordinarily include that page (for example, a page from another department, or another website), you may want to consider implementing a **Redirect** asset, which can be set up and then included as a part of your local menu.*

Creating a standard Content Page

HOW TO DO IT:

First, select the folder you want the item to be created inside of, so the CMS knows where it will put the new item. Then, from the **Cascade New** menu, select your area (here, "CMS Sandbox") and then choose **Folder with standard Content Page** from the pop-out menu (exact name may vary). This will create a folder with a basic page already inside (called "index" by default). It helps to remember: the way the UH website CMS is set up, there is only one default page per folder, and it is always called "index". Any descriptive naming associated with this page needs to be assigned to its **enclosing folder**. (See also information above, "Some of the most common Asset Types / Folder")



TIP: UH web pages are set to publish out to the server from the CMS as ".php" files. However, within the CMS application the page-assets do not yet have a file type, and so remain without a file extension (e.g. "index" vs. "index.php"). The CMS will only append the file extension as it constructs and publishes-out the final webpage. See also p. 34 - Publishing - the CMS Publisher.

IMPORTANT FOLDER-LEVEL INFORMATION:

 A screenshot of the 'New Folder' dialog box in the CMS. The dialog has two tabs: 'System' and 'Metadata'. Under the 'System' tab, the 'System Name' field contains 'folder-with-index' and the 'Parent Folder' dropdown is set to '[UH - Web Site/your site]'. Under the 'Metadata' tab, the 'Title' field is empty. The 'Display in Menu?' checkbox is checked, and the 'Display in mobile site navigation?' radio button is set to 'No'. The 'Metadata Set' dropdown is set to '[UH/Folder]'. Below this, there are two checkboxes: 'Publish' (checked) and 'Index' (checked). At the bottom, there are 'Submit' and 'Cancel' buttons.

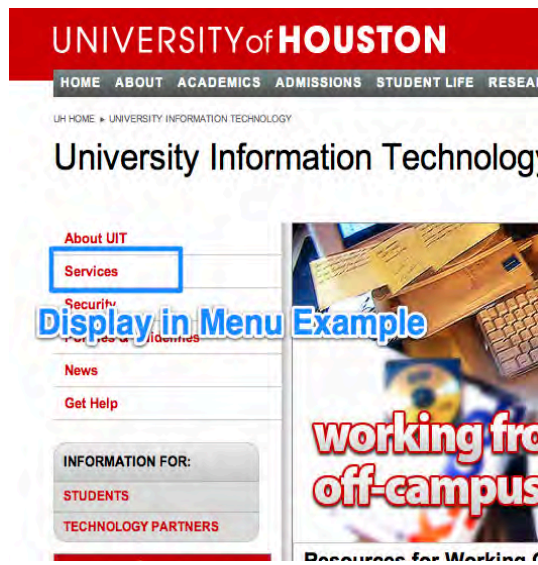
System Name: In the CMS, the name attached directly to any asset is called its **system name**. Here, we are considering the system name for a Folder. This will be used not only for identification purposes but also to build the final web address for that page. *For example*, if you name a folder "**science**" then the URL to get to the default web page inside that folder might become: <http://www.uh.edu/your site/science/index.php> or <http://your site.uh.edu/science/index.php> (depending on how your site is setup).

Important: UH file naming conventions state that **system names should not contain spaces** or special characters (except for dashes) and should be all lower-case. Avoid using the underscore. Use whole, brief, meaningful words whenever possible. Any abbreviations should be able to be read and understood easily by your site's expected visitors. See also p.22 file naming notes.

Parent Folder

This setting gives you information about where the CMS is creating the new page, and allows you to change that location manually by clicking on the **CMS-internal path link (CMS-browsing icons)** inside the square brackets. Use the resulting dialog panel(s) to select the desired destination.

More typically, however, you will be able to select beforehand where a new asset will be created – by highlighting the folder into which you wish to put the new item *before* you go to the **New** menu to create the asset. (There are rare exceptions, such as a News item.)



A Folder's Inline Metadata:

Title – The **Title** information at the folder level provides the words which will appear in your left-hand **navigation menu** as well as the wording for the “**breadcrumb**” links at the top of the finished page. Unlike the *system name*, this may be more grammatical, and can contain spaces, capitalization, etc.

Display in Menu means that the enclosed page will be a part of your site’s left-side **navigation menu**. If you have an folder which does not need to be in the navigation, such as an *_images* or *_documents* folder, just uncheck this option.

Display in mobile site navigation – Only select this if your site or page requires a mobile-specific configuration and is mobile-ready. (*Note: mobile-specific versions have been deprecated. For additional information, contact either Marketing's Web Communications group or UIT's Web Technologies group.*)

Publishing and Indexing:

After creating a **System Name** and **Title** and reviewing where the asset will be created, next look to see whether the **Display in Menu**, **Include when publishing**, and **Include when Indexing** selections are checked. (*Note: the **Metadata Set** is part of your site setup and will not change.*)

Most items will eventually need to be published at some point; however, some will not, or you may not be ready to publish certain items. De-selecting the **Include when publishing** option will protect/prevent items from publishing. If a folder is set to not publish, then nothing inside the folder will publish either, regardless of the individual publishing settings of the nested (or “child”) items.

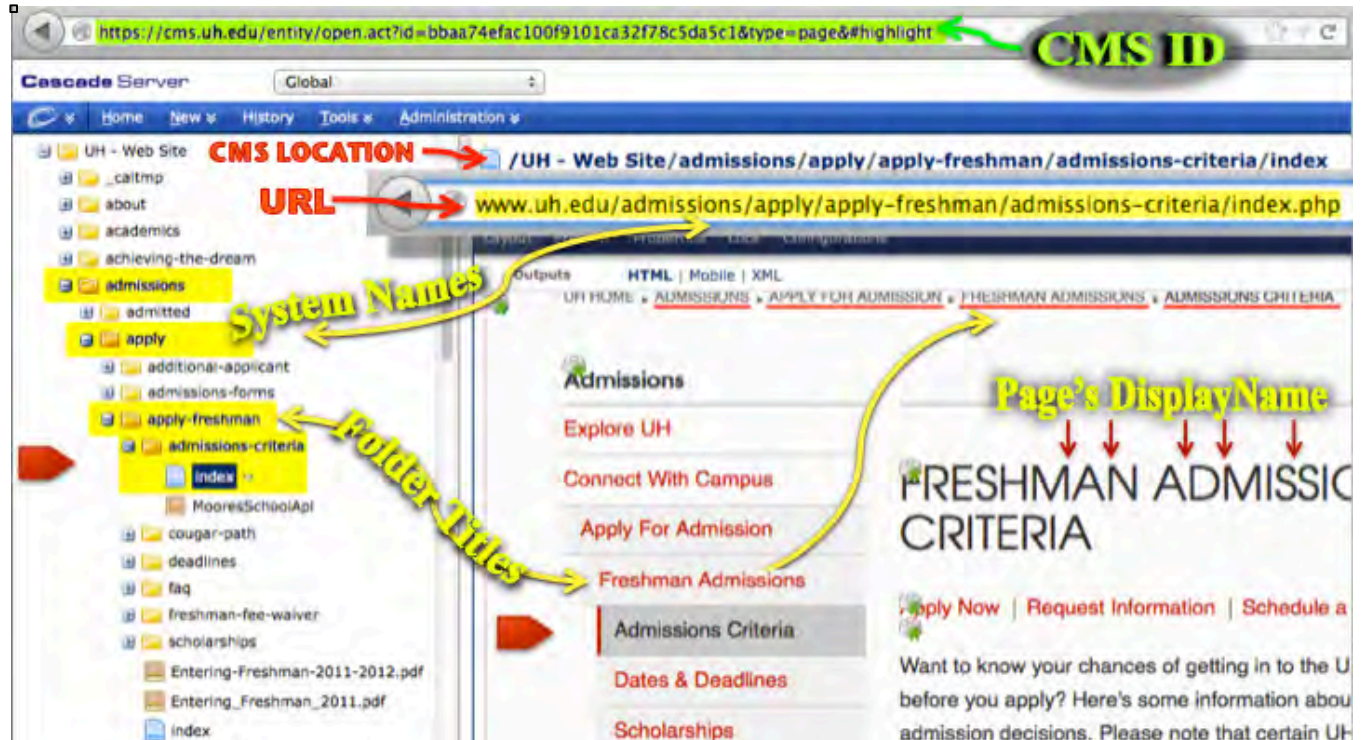
Include when Indexing enables the CMS to include an asset's information in an indexed list, such as your site’s **left-hand navigation menus**. Typically, you should leave it *selected* (the default setting) unless you have a specific reason to switch it off. *Please note that a page cannot be included in your site’s menu or breadcrumbs unless this setting is enabled.*

Advanced Options available vary by how your site is set up. Typical options here might be *spell check, link checking, accessibility check...*

When you are finished with the folder-level settings, click “Submit” to keep them.

Notes about the Navigation Menu, Breadcrumbs, URLs, CMS IDs

Most of your site's pages will display some sort of on-page left-side navigation menu and breadcrumbs. **Both the text for the Left-Nav Menu and the Breadcrumbs comes from Title information which you assign to the Folder holding that page (even though the menu is rendered into the page itself).**



Once assigned (or changed), the CMS will *dynamically* update and integrate all **Left-hand Navigation Menu** and **Breadcrumb** information for you throughout your Site. You are then responsible for making sure that the Live, Published version of your site gets **Synchronized** with the CMS version. This is done by Publishing each and every page which "sees" the change. That set of pages will consist of everything inside the changed item's "Parent" Folder – i.e. whichever Folder *directly holds* the Folder which had its Title information changed. Thus, while you cannot *directly Edit* the text of a Page's Left-Nav Menu or Breadcrumbs (as with any other content), you do control what they say because you can assign or edit Folder Titles. It may also be helpful to remember that the CMS is always building a unique, customized Left-Nav Menu and Breadcrumb string into each and every individual web page which has been instructed to include those items. What those items consist of will be based on where that page is within your site structure, and on whether or not its Folder's/System-settings have *Display in Menu* elected.

Web Address or URL

In a similar way to the navigation items, a page's final published web address (URL) is also "built" by the CMS - by concatenating the **system-names** of each page's **enclosing folder**, together with (a translation of) your site's **home directory** (e.g. "UH – Web Site" becomes <http://www.uh.edu/>).

CMS Identifier – the asset's CMS ID

Inside the CMS each page (in fact, every asset) is assigned a complex and unique identifier when it is created (above, highlighted in green at the top of the illustration) – and this ID stays with the asset regardless of whether it is renamed, moved, modified, etc. You may see an asset's CMS ID displayed in the address bar/field of your browser when the asset is selected. Your browser might also display the asset's CMS ID when your cursor rolls over it. This is a reflection of the CMS acting as a large database which tracks every asset/action in your site – who, what, where, when, how, etc. etc. etc.

Editing standard Content Pages

While you are editing in the CMS, remember to preserve your changes at each step.

TIP: At each editing step in the CMS you should remember to actively accept the changes you have made, otherwise the CMS will try to either discard them or only save them in DRAFT form. In current versions of the CMS if you see a message about leaving the page, then the CMS believes a change may have been made. In Cascade 7, Draft versions are automatically saved for you (previously, it was strictly manual) – so pay close attention to whether you are editing a Draft or Submitting the active page. See also: additional notes about Drafts on p.29.

TIP: When working on your web pages it will be also be important to remember that files and folders have special “parent-child” relationships within the CMS. In particular, settings at higher levels may change how settings at lower levels work (e.g. if a “parent” folder is set to not publish, none of its “children” / nested sub-folders will publish either, regardless of their individual settings).

WHERE TO START

In the “asset tree”/explorer view on the left side panel, select the *Folder* containing your *Page*. You will then see information about that folder displayed in two different ways. Those items contained directly within/under the folder (e.g. here, the default “index” page) will be displayed both under the folder’s icon in the “asset tree”/explorer view on the left side, and in the right-side asset-information panel.

The screenshot shows the Cascade Server interface. On the left is the asset tree with folders a-trainee-11 through a-trainee-20. The folder a-trainee-18 is selected. The main panel shows the contents of /CMS Sandbox/a-trainee-18. The table below represents the data shown in the screenshot:

Name	Order	Last Modified	Last Modified By	Actions
..				
.._documents	5	Aug 14, 2013 7:20 AM	trainer18	[Icons]
.._images	6	Aug 14, 2013 7:20 AM	trainer18	[Icons]
.._sample	7	Aug 14, 2013 7:20 AM	trainer18	[Icons]
..penguin-upload	8	Aug 14, 2013 10:38 AM	trainer18	[Icons]
..sample-page-2	4	Aug 14, 2013 7:20 AM	trainer18	[Icons]
..sample-page-3	3	Aug 14, 2013 7:20 AM	trainer18	[Icons]
..sample-titles	2	Aug 14, 2013 9:44 AM	trainer18	[Icons]
..index	1	Aug 14, 2013 10:12 AM	trainer18	[Icons]

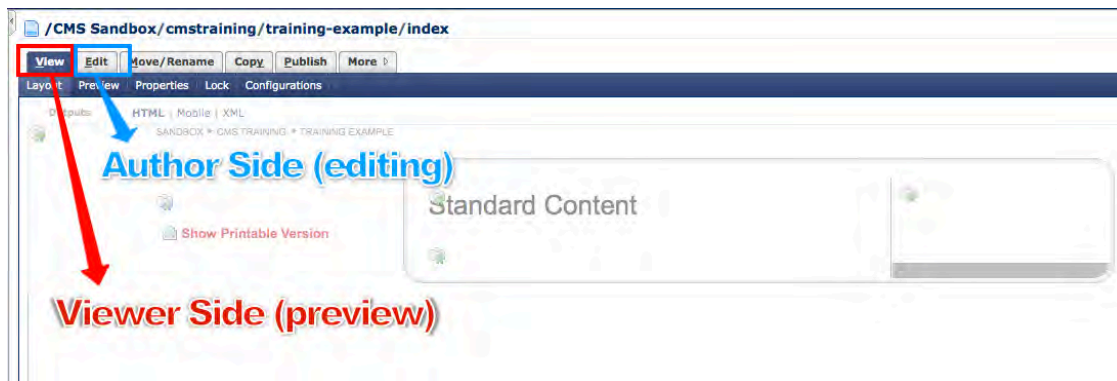
Each folder’s right-hand-side asset-information panel, in addition to showing any assets directly within the folder, also gives users editing-access for the folder-level information. Additionally, this view allows users to change the **Order** of any sub-folders. **Re-ordering sub-folders affects the order of the on-page navigation/menu display**, allowing you to override the CMS defaults when desired (e.g. *chronologically, with newest item being displayed as the last item in the left-side navigation menu*).

Each View panel also shows, at the top, the asset’s relative position/path within the CMS. In the example shown above: **/CMS Sandbox/a-trainee-18**

Select the folder’s index page icon to see the Page Preview mode and to access the Page’s editing options.

VIEWER / PREVIEW vs. AUTHOR / EDITING VIEWS

With a page icon selected you first see a Preview, or Viewer Side version of your page, in the right-hand-side asset-information panel. (A newly created page will naturally look somewhat sketchy and empty.)



This **WYSIWG** pre-view is the CMS's best attempt at showing you how your page content will display for your site visitors – thus, "What You See Is What You Get". This view can therefore be very useful for review and approval processes whenever materials for your site are under development. One typical exception may be a custom home page with a Rotating Feature or Slideshow – for which you may need to publish out to Staging to review exactly how it looks and works.

Note: In addition, there are some pieces of the final webpage which you may not see here, as the basic UH header and footer areas may not be showing, and the final browser window title cannot be seen. These are all included by the CMS upon publishing. Thus, you can review the whole webpages by publishing them to your site's testing/staging area before they go live. See also: **Publishing – The CMS Publisher** later in this handout.

EDITING PAGES

To access the Author Side features and to start editing your page(s), click on the **Edit** tab in the asset-information panel **menu**. You will see that the main content editing panel for your page will contain a number of separate forms- and fields-based areas. You will be selecting or filling in information with these forms and fields, which information the CMS will then incorporate into the final webpage layout.

NOTE: Different sites may have different standard page layouts.

However, typical areas may include, among others:

Inline Metadata	Standard Content
<ul style="list-style-type: none"> ➤ Display Name ➤ Title ➤ Keywords ➤ Description 	<ul style="list-style-type: none"> ➤ Banner/Column Image options ➤ Rich Text ("WYSIWG") Content Editor(s) ➤ Related Links ➤ SPIFF Banks ➤ Layout Options (e.g. Wide vs. Standard)

Important page-level information and editing options are discussed following, including: Inline Metadata, Standard Content Areas, Inserting Hyperlinks, Internal vs. External links, Working with Images, Banner and Column Images, Related Links Banks, and Layout Preferences.

IMPORTANT PAGE-LEVEL INFORMATION:**Inline Metadata**


/CMS Sandbox/CMSTraining01/index

View Edit Copy Publish Delete Advanced ▾

Content Metadata System Configurations

Inline Metadata

Display Name: CMS Training Class

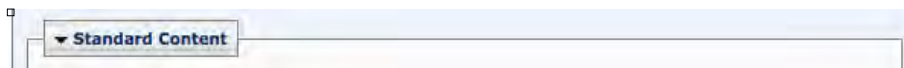
Title: CMS Training Classroom at the University of Houston

Keywords: CMS, Training, UH IT Training, University of Houston

Description: CMS Basics Class for the University of Houston IT training department

Fill in a **Display Name** (This shows up on your page a like a main heading); the **Title** (This will become the site visitor's browser-window-title); and also the **Keywords** and **Description** (These represent meta data for the web browsers/search engines to use when looking for your site content. Description may also show up if the page's information is "indexed" by a specialized page.)

Note: To Cascade Server, any information describing an asset may be considered "meta-data", and thus the term "meta" is used somewhat differently than in HTML header tags. When the CMS is building the final page, however, it does construct the HTML's TITLE tag from this "Title" field, to display as the final page's browser window title. Please make sure this Title represents the page's purpose and identity while remaining brief.

Standard Content Areas

Items mentioned briefly above, such as the **Page Banner**, **Multimedia**, **SPIFF Banks**, and other items may or may not be available in your site's **Standard Content Areas**, or they may be configured variously based on your site design – *however, in general:*

Page Banner/Column options allow you to make some template-compatible variations to the layout of your overall page – for example, displaying background column images of your choice.

You may also wish to incorporate **Multimedia** items into your page; or a bank of template-compatible **Related Links** – links to material you believe your site visitors would be interested in, based on their selection of a particular page or area within your site, but which is not necessarily a part of your site; or include **SPIFF Banks** – a specialized format for including either a single or a small row of photos with captions and brief descriptions which can then be linked to pages with more detailed or complex content. **Layout Options** can allow you to include custom CSS stylesheets or JavaScript. Most commonly, the **Layout Options** area will allow you to choose how many columns, or how "wide" the content area is, that your page will display.

See following the *Standard Content (Body Copy) Editing* information for more expanded or illustrated details about Banner and Column Images, Related Links, and Layout Options.

The **Standard Content (Body Copy) Editor** area is typically included for all CMS Editors. While some of its included features may vary, the most used features are described below.

The Content Editing Area(s) – and the Rich-Text WYSIWYG Editor

This is the most fundamental place where site editors can add, format, and update site-specific content – the heart of your website !

The **Standard Content editing area** typically includes a “**Sub Header**” option – which allows you to include a template-compatible subhead to describe your page's content. This subhead will appear directly below the main headline/Display Name for the page (see above – *Inline Metadata* section).

The **Rich-Text Editor feature** (most commonly used with **Body Copy**) might be described somewhat light heartedly as a *WYSIWYG* (or, *What You See Is Kinda What You Get*) editor, because it may not fully consider all of the formatting and styles which will be applied to your final pages, unlike the more sophisticated *Preview/View* panel mentioned earlier.


The **Rich-Text Editor** will allow you to perform the basic editing needed to create and update your page content. More details about each of the editing tools are provided on the following page.

Editing Your Content's HTML /Source Code:

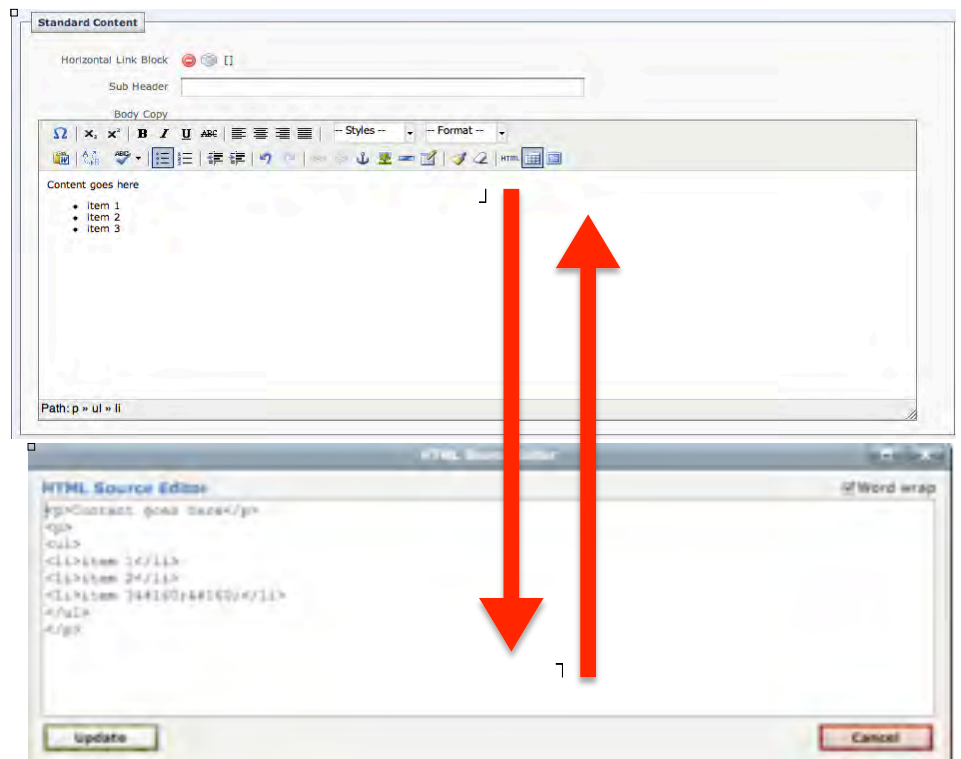
For those comfortable with page code, the **Rich-Text Editor** provides an embedded plain-text HTML Editor.

Click the **HTML** icon to launch the **HTML Source Editor**. Here, you can edit, copy, and paste page code. A quick way to move content into the CMS is by copying from your old site's page code, or from alternate source code editing programs (e.g. Dreamweaver, BBEdit, etc.), and then pasting it in here. The CMS will immediately interpret and display the Rich Text view when you click "Update". Keep in mind, as you edit in the Rich Text Editor, the CMS is always simultaneously creating the underlying, *well-formed* HTML version – whether you look at it or not.

Blocks: You may also see that your Standard Content Editing area includes CMS linking tools to include types of “Blocks”. The types of Blocks optioned here will be based on your site's template.

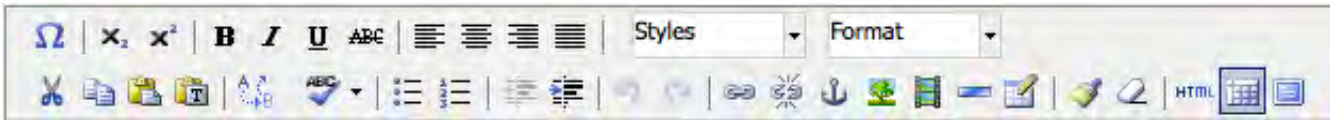
TIP:  Wherever you see an **internal linking tool** (the icon/square-bracket combination) showing a block icon, you have the option to include this type of asset. **Blocks** represent smaller pieces of reusable content which can be inserted in multiple places – e.g. a departmental address which you wish to display the same way in a number of different pages. By using a Block, you will only have to update the information in one location, and the CMS will automatically disseminate the update to all the places within the CMS where the Block is included. To see this change (or any change for that matter) LIVE, however, all pages which were affected by the change will need to be published (or re-published). More information about the CMS Publishing process is provided later in this handout. See also the notes about the Relationships tab above.

When finished editing your content don't forget to click “Submit” (or “Update”) !



NOTE! - Remember that every dialog or editor the CMS opens up needs a confirmation to save your changes. The CMS does not “auto-save” per se (although it now automatically saves "Draft" versions whether you want it to or not). To discard changes you do not want, you can click “Cancel”. Alternately, you may simply leave a page without saving – but be aware: if you had made multiple edits then ALL collected changes for that page will be discarded by leaving without “submitting” them to the CMS’ data-stores.




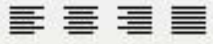

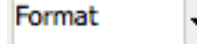






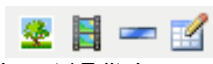


EDITING TOOLS AND FORMATTING



Many of the CMS editing tools here work similarly to the familiar MS Word products’ tools.

As you are working you will see that when an icon is grayed out it means the tool is unavailable. Make an appropriate selection in the content editing window and the accompanying tool options will become available – e.g. your cursor must be in a paragraph in order to indent that paragraph, or to turn it into a bulleted list; or some text must be highlighted first before you can apply a hyperlink to that text, or before you can make it Bold, etc.

Also, while you may not always wish to edit the HTML version directly, it can be helpful to remember that in the background the CMS is *always creating that code anyway* - based on whatever you are doing in the overlying Rich Text View. Remember, the CMS's ultimate purpose is really to assist you as much as possible in creating your webpages' source code.

 insert special characters	 Superscript, Subscript	 Bold, Italic, Underlined**, Strike through	 Alignment	 Apply those local styles available from your template	 Assign semantic formatting (making text into a paragraph, or a header, etc.)
 Cut, Copy, Paste, Paste as Text	 Find / Replace; Spellcheck	 Bulleted list (unordered list); and Numbered list (ordered list)	 Indent / Outdent as a block	 Undo / Redo edits	
 Insert / Break / Edit Hyperlinks	 Insert / Edit: Image, Multimedia, Horizontal Rule, Table		 Clean up code; Remove formatting	 launch HTML Source Editor; toggle hidden element viewing; toggle full-screen for editor	

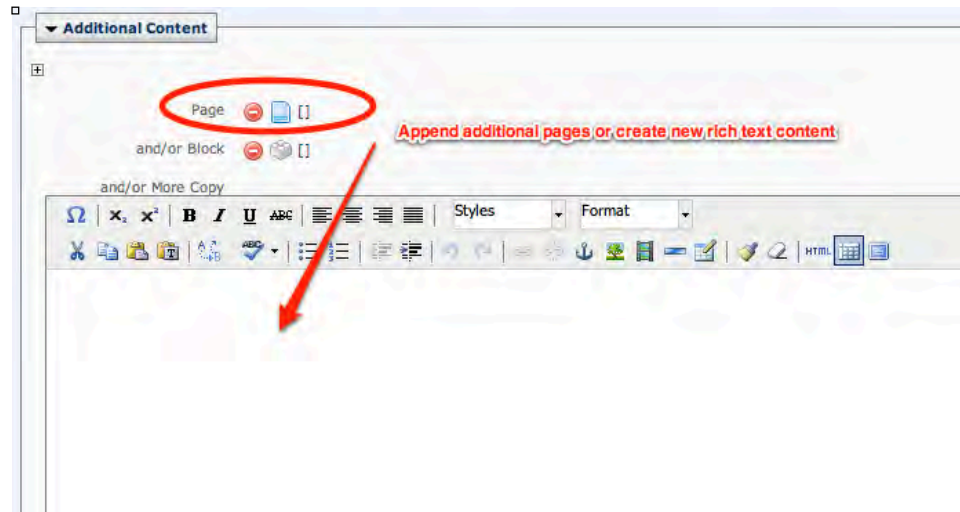
** Note: underlining text is not recommended, as it can create a visual confusion with hyperlinked text.

A Note about the Format popout:

When working with text it is important to make sure its 'format' is appropriately assigned (e.g. as Paragraph, Headline, etc.). Place your cursor inside the text. If a Format is already assigned, it should show up in the Format window as soon as you click in the text. If none is assigned, choose one from the popout – and please be aware that without an appropriate Format, the UH Styles cannot display correctly on the page, and it can become more difficult for the page to be interpreted by text readers and search engines.


Additional Content Areas

Additional content areas allow users to create separate areas of content which will be inserted into the page in locations determined by that page's layout. These separated areas can make it easier to manage and organize information which may have specific purposes, such as left or right column copy.



Additional content can be added into these Rich Text Editors just like any of the Rich Text Editors you may encounter inside the CMS. By using whatever linking tools may be associated with this variety of Data Definition, you may also have the option to pull into your page a copy of another page's content well, or insert a block of reusable content, As indicated in the illustration above.

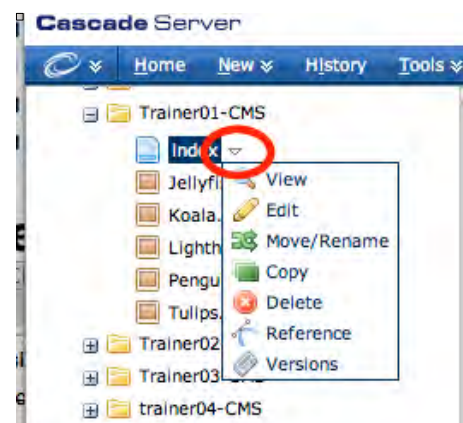
Note: Because internal links draw on the CMS's internal data-stores instead of live web pages, if you choose to include a different page's content in the page you are editing, it is also your responsibility to ensure that **both** pages are approved for publication before it comes time to publish your page.

TIP: Whenever you see a small “plus” icon  in the CMS it generally means **another like item** can be added just by clicking the icon. **Like Items** are defined by the boxes outlining the particular data definition area (“Boxed Sets” act together to build specific pieces of the final web page). The example above shows linking icons associated with a Rich Text Editor, but Boxed Sets can include many other types of data definitions as well. To learn more, see also the information on Related Links later in the handout.

TIP: Easy Editing Shortcuts

Wherever you see the small arrow next to an item (e.g. each folder, page, or file) clicking it will open up an editing shortcuts menu.

Options available are: View, Edit, Move/Rename, Copy, Delete, Reference, and Versions, just as from the Editing panel. (Available options may vary by users' permissions levels.)



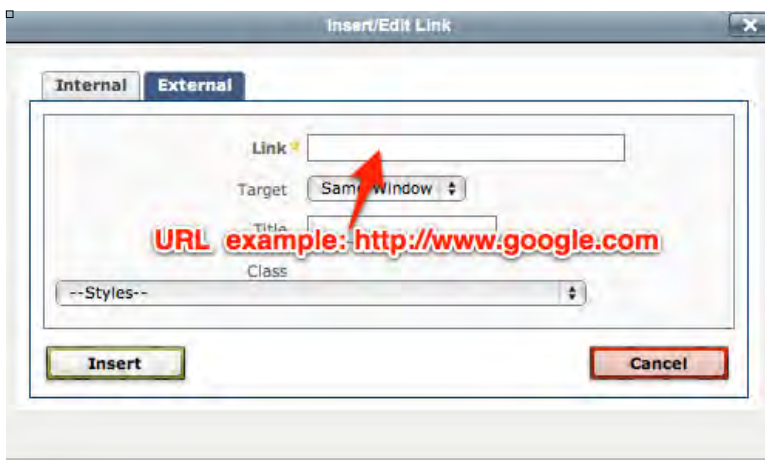
Inserting Links

To create a hyper-link in your page content, do the following:

1. Within a Rich Text Editor window, type-in, paste-in, or otherwise **create the text** which will either become or contain the linked item. (*hyper-links may be applied to images as well.*)
2. **Select (highlight) the words (or other item, such as an image)** you would like the user to click on when visiting your final page. Here, the phrase “Text for Link” is selected.
3. With the item still highlighted, **then click on the Insert/Edit link icon** (the chain link).



4. You should then see a new **Insert/Edit Link dialog** appear, where you will fill in the link information. **Select either an Internal or External Link.**



Internal vs External Links:

Internal links are links to objects and pages within your area of the CMS, which the CMS is then able to track and manage using its built-in capabilities. Upon publishing, the CMS will translate this internal referencing into URLs.

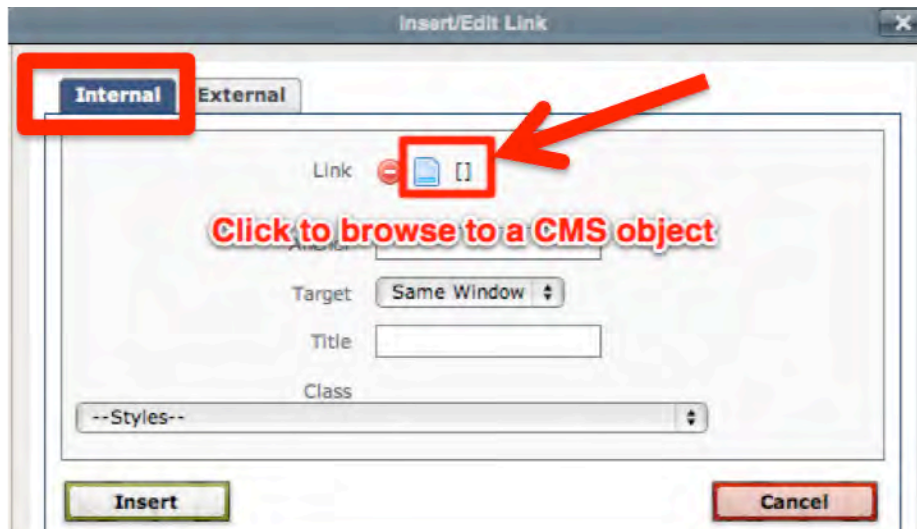
External links are the web addresses (URLs) of resources outside the CMS. If these web locations later change, you will update them manually – either individually or via a Reusable Link asset.

To create an external link, paste a URL into the **Link** field under the **External** tab.

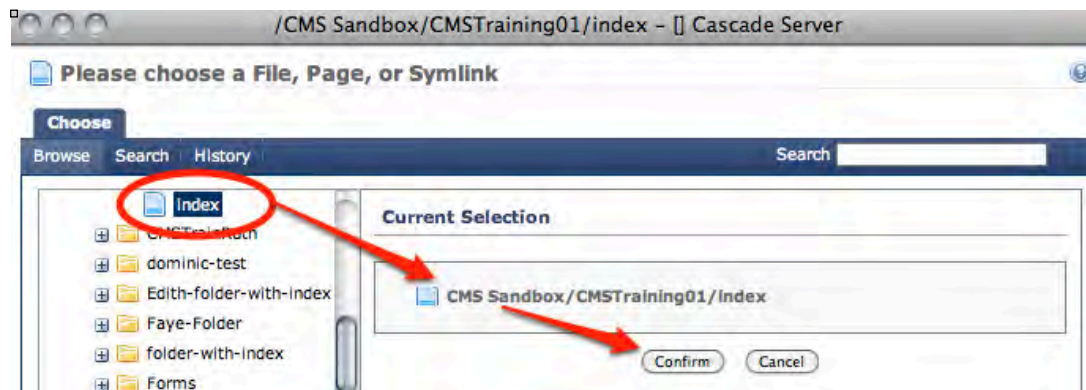
In order to create **email links**, simply start by creating an external link, then instead of using a URL in the link field, type “mailto:” followed by the email address – include the colon, no quotes, no spaces – e.g. <mailto:youremailaddress@uh.edu>

(Note: if the Link field says HTTP, etc. or other default text, you will need to erase that part and start with a blank field before entering the mailto: piece.)

To create an internal link, you will be using the **linking tools** under the **Insert/Edit Link** dialog **Internal** tab:



Clicking the **CMS-browsing icons** (icon and square-brackets pair) will bring up another, explorer-view dialog window:



From this new dialog, **navigate to a page (or other asset) from within your area in the CMS** which you want to link to. Choose from the left-hand list of folders and files.

Review your chosen CMS-location/path for the item you have selected. It will show in the right-hand-side, *Current Selection*, area); and then **click "Confirm"**.

TIP: *Regardless of whether you use internal or external links, it is important to also fill in the **Title/Alternate Text** information for your links/images, to help web visitors with disabilities better access and understand the link information on your pages.*

Wherever the CMS asks for Title/Alt/Alternate Text – please fill it in! Your site visitors will thank you!

Notes on Screen Readers (e.g. JAWS) and the text that holds your links:

Screen readers are great – they can offer visually impaired users a summary list of linked text phrases from the page for a user to skim through. However, if this list consists of something like a repetition of "click here", it won't be of much help. Screen readers cannot convey the same kind of visual context which a sighted user can gather in just a glance, so please always make sure your link text is descriptive and concise. For example, rewrite "[Click here](#) for instructions" into "[View instructions for downloading software](#)".

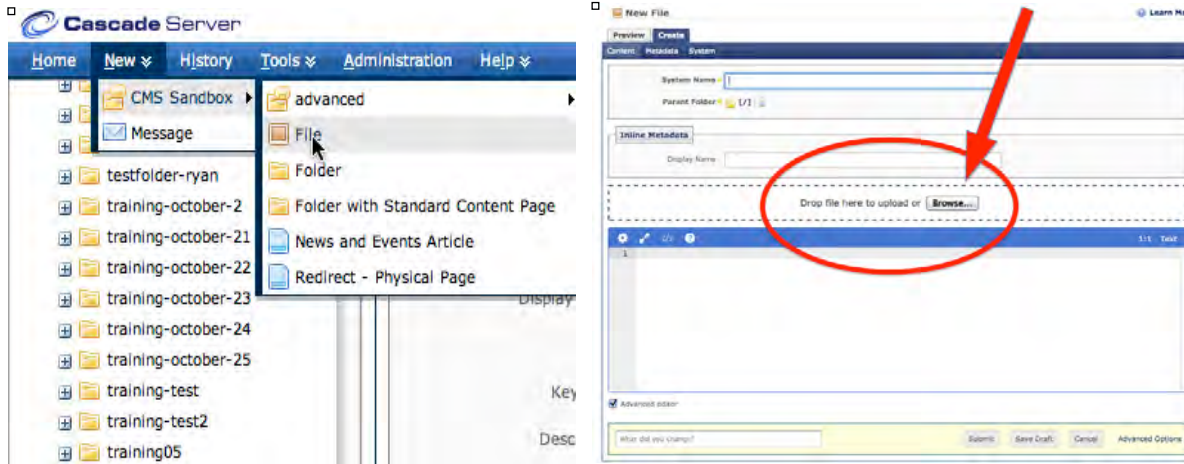
Working with Images and other "Files"

How to Upload Files:

NOTE: This same basic process will be used for uploading any type of file: digital images and other graphics such as JPEG, GIF, PNG; documents like PDFs, Docs, Power Point, Excel files, etc.; and text files such as CSS, HTML, JS, etc.

TIP: To the CMS, pretty much everything that is created outside the CMS and then imported in (i.e. uploaded to the CMS) will be treated as a "file" asset within the CMS. Additionally, strictly text-based files (e.g. XML, CSS, etc.) can be created directly from within the CMS itself, starting with this same process.

1. Click on **New** → and navigate to the **File Asset Factory** to open the **New File** dialog.



2. Go to the **File Drop/Browse** - section and either **browse** for the file you wish to upload into the CMS, or drag the file's icon from your desktop into **the Drop zone**. *Unless you are specifically creating a text-based file from scratch***, you can ignore the other fields in the New File dialog.

The CMS should pick up essential information from the imported file itself. However, the CMS may stop and ask you to rename a file if the filename contains characters it considers ineligible for use in filenames – If so, it should allow you to rename the file as part of the upload process. However, to avoid tripping up the CMS, ordinarily you should **not** rename a file at the same time you are importing it. If you simply want the file to have a different name inside the CMS, then you may use the Rename tool after the file has been uploaded to the CMS. The best practice would be to rename a file before uploading. And please bear in mind that avoiding special characters in filenames is a good idea all around.

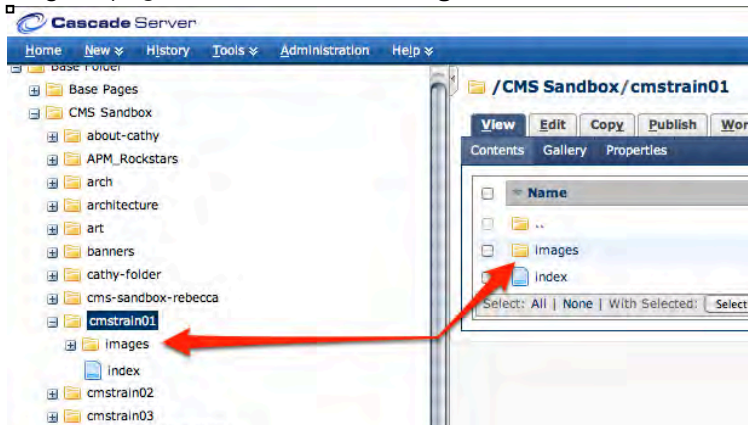
****To create a text-type file, enter a system-name, confirm where the file will be created (its Parent Folder), and enter the text content in the New File dialog's plain-text-editor. Submit to save.**

System Names: Some Important Notes About Naming or Renaming Files and Assets:

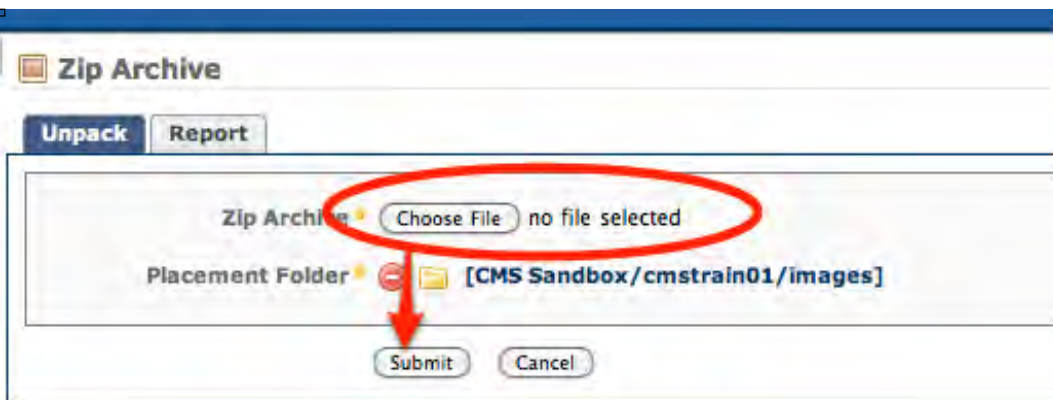
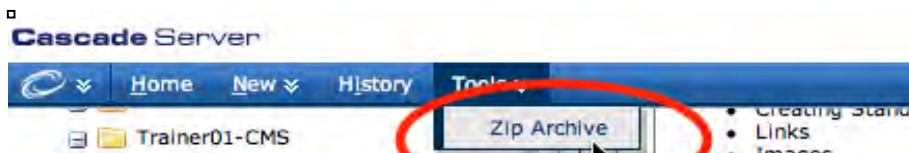
<p>AVOID these in System Names:</p>	<p>It is also important to avoid certain special or punctuation characters - such as the following:</p>		
<ul style="list-style-type: none"> • CAPITALS (use all-lower-case letters for system-names); • Spaces or Underscores (stick with dashes to separate words); • Periods (anywhere except for the final extension - for example .docx); • Extra-Long Filenames (some systems have trouble with long filenames - 32 characters is a common limit); 	<ul style="list-style-type: none"> ? - question mark @ - "at" sign & - ampersand * - asterisk % - percent sign 	<ul style="list-style-type: none"> \$ - dollar sign ! - exclamation point = - equal sign # - hatch mark () - Either open or closed parentheses, especially if they are not "paired" 	<ul style="list-style-type: none"> \ / - either forward or back slash , - commas :: - either colons or semi-colons ~ - tilde

Uploading Multiple Files / Images

- You can import multiple images (or files) at one time into the CMS by first creating a Zip file (.zip) containing all the items that you want to upload. (You will use your own utility program, outside of the CMS.)
- Then, inside the CMS, first select the folder under your area where you would like to upload the images (e.g. the **cmstrain01/images** folder illustrated below).



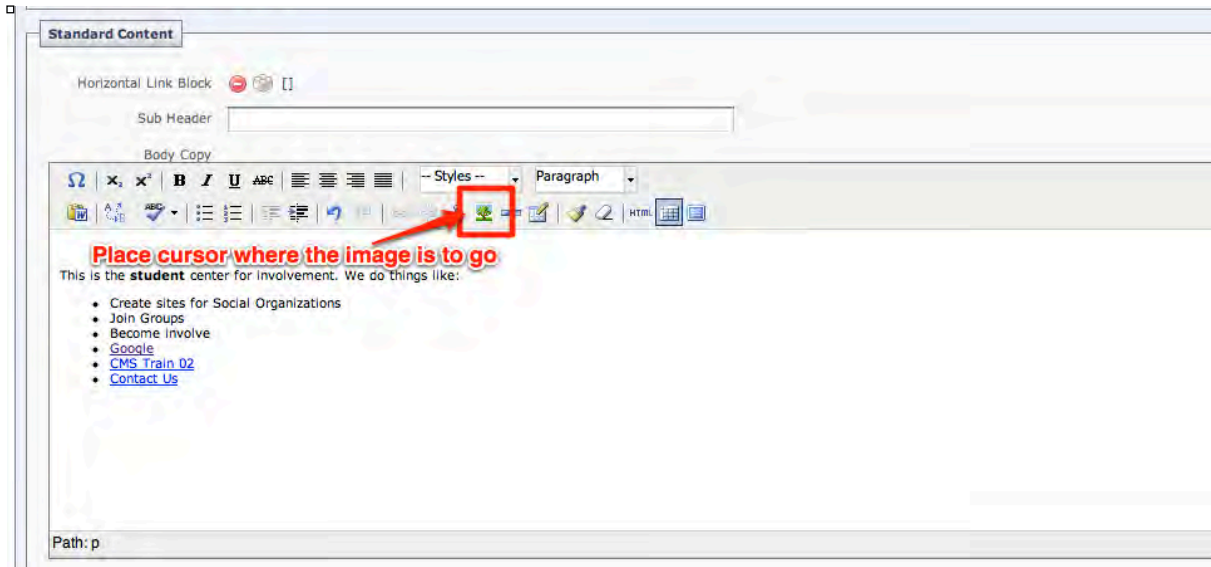
- With the images' destination/placement folder selected, choose - Zip Archive from the **Tools** menu to open the **Zip Archive** dialog.



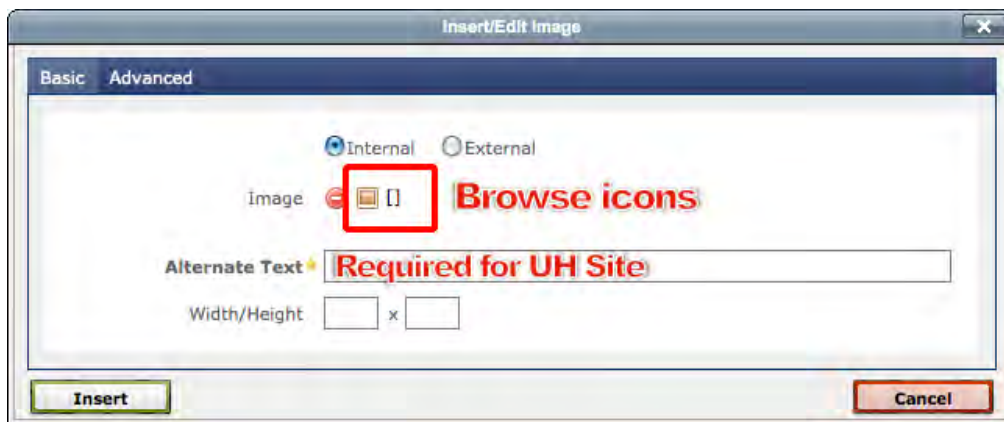
- Click on **Choose File** and **browse** to find the Zip file you created earlier.
- Check the **CMS Placement Folder** path to make sure that the **images** will be saved to your desired CMS location.
- Click **Submit**.
- Your **image files** will be unpacked into the CMS folder.
Note: On the Mac an extraneous duplicate folder of dot files may be created at the same time (e.g. `__MACOSX/._filename.png`). These "duplicates" can be safely deleted.

Inserting Images into your Web Page Content

1. From the editor window, choose the place in your page content where you would like the images to show up. **Place your cursor** where the image is to go (a good place is right before the first letter in a paragraph), **then click the tree icon** in the tool bar.



2. The tree icon launches the *Insert/edit Images* dialog:

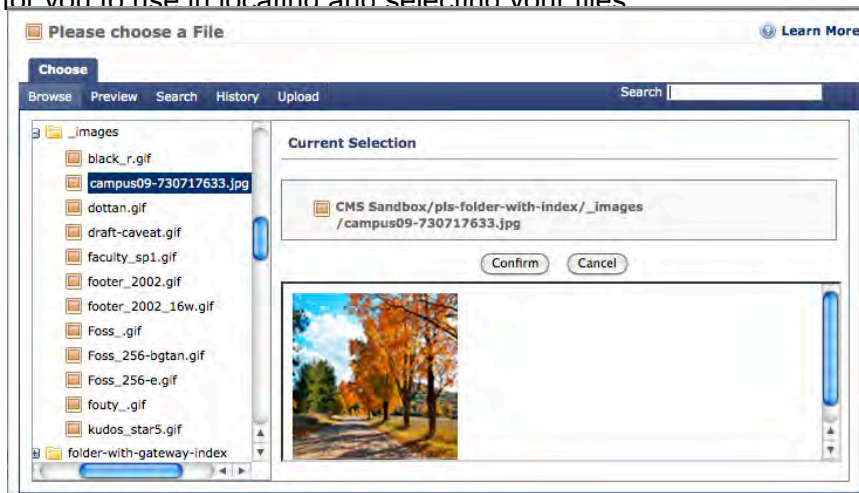


3. You will typically be selecting the images you want from files *you will have already uploaded* into your site's "images" folder. So here, choose "Internal" and click the **Browse icons**. The **CMS-browsing dialog** window ("Please choose a File") will then appear . . .

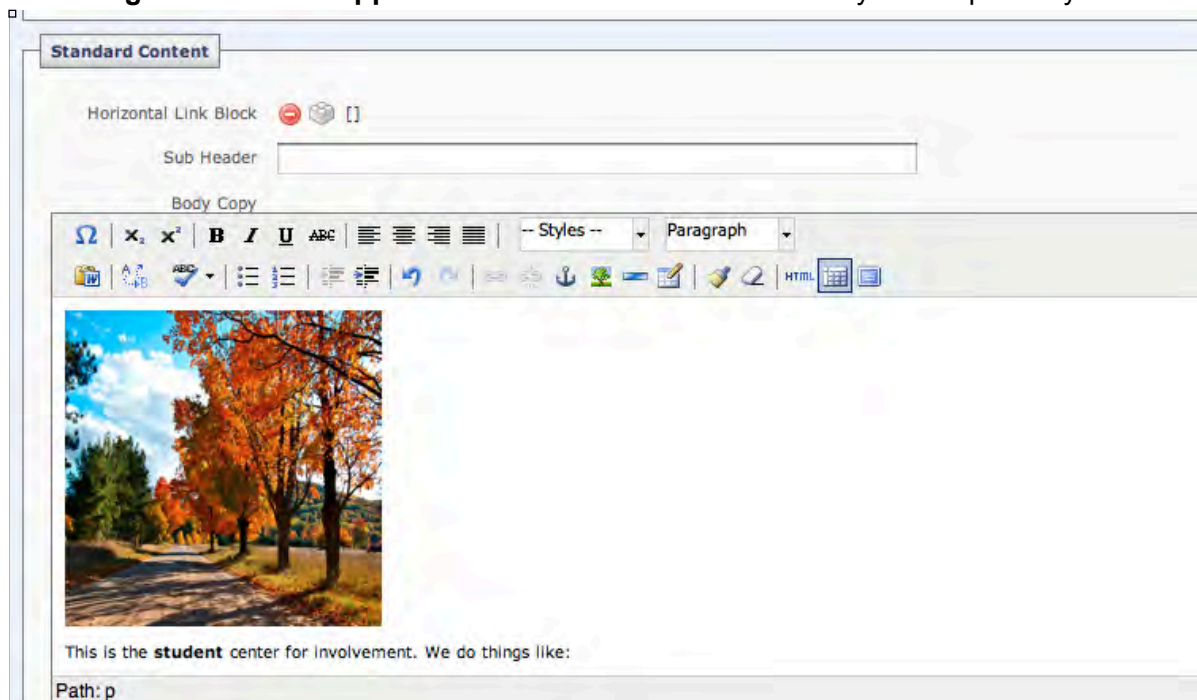
Remember: At some point before you finish with this dialog, you will be filling in the **Alternate Text** (and/or Title Text for links) – to describe the image/link to those site visitors who may be visually impaired and/or using various types of software to "read" your web pages.

And please note, that although it is possible to link to a file outside the CMS, it is not recommended, and can cause headaches in the long run. However, if you need to do so, you would select "External" and paste in the appropriate URL. You will still need to provide the Alternate Text.

The **CMS-browsing dialog** contains an independent folder-view navigation panel for you to use in locating and selecting your files:



4. **Select the desired image using the browsing dialog**, then click on **“Confirm”**.
5. **The *Insert/edit Images* dialog** will now show you the internal link to the image. You will fill in the **Alternate Text** information, then click **“Insert”** to accept the image.
6. **Your image should now appear in the Content Window** where you had placed your cursor:



You will be able to adjust the image size, etc. as desired by selecting the image and then again using the **Insert/edit Images tool (tree icon)**. *Best practice, however, would be to size the image to the desired size **before** importing it into the CMS if possible.*

7. And as always: remember to select **“Submit”** to save any/all editing changes for the **whole** page!

Banner and Column Images

Banner or Column images will display as background graphic elements for your pages. The options available to you and precisely how the different options will look on the finished page depend on how the page templates for your site are configured; however, as a general rule column images will appear at the top of the right-hand column, and banner-sized images will span across both the page's central and right-hand column. A Banner will cover a column image, so you will want to choose either, not both.

To use a banner or column image:

From the editing panel of the page you want to display the banner image, scroll down to find the **Page Banner** section. Use the **CMS-browsing icons** to tell the CMS which images you want to associate with this page.



For instructions on using the **CMS-browsing icons**, see the section above relating to **“Inserting Images into your Web Page Content”**.

An example of a UH page using a **Column Image** as well as **Related Links**:

Related Links

Related Links are banks of links which display in a particular UH style, are customizable, and can be added in sets. They may be employed either on the left or right side of your page.


Related Links should take your site visitors to information which is *related* to the page or area they are visiting - information relating to your content, not necessarily the actual content itself. They should *supplement* the site visitor's experience, rather than be a substitute for well-structured navigation and sub-navigation.

□ [UH Home](#) / [Costs & Financial Aid](#)

Costs & Financial Aid

- [Undergraduate Costs & Financial Aid](#)
- [Graduate Costs & Financial Aid](#)
- [Payment Information](#)


Costs & Financial Aid



Concerned about paying for your education at the University of Houston? Think of it as an investment in your future. Whether you're an undergraduate or a graduate student, a UH education will pay for itself many times over in higher earnings and expanded opportunities throughout your life.

What's more, we award a wide range of scholarships, fellowships,

Related Links



Related Links

- [Net Price Calculator](#)
- [Satisfactory Academic Progress](#)
- [Scholarships](#)

As examples: You may want to provide links to other closely related areas of the UH website. Or you may want to provide links to outside professional-resource groups of interest to your targeted audience. Or if you had a PDF download link on one of your pages, a helpful related link might be to Adobe's site where site visitors could download the free Adobe Reader software that they would need to ensure they can open your file.


Note: if you feel your site visitor(s) will have trouble finding the critical information within your site in any other way than a related link, it is recommended that your main site structure and navigation be reviewed to see if there is a better way to organize and present your area's information using the site navigation itself.

Note: UH Web Best Practices state that if your site employs downloads or media, you must make available to your site visitors whatever they may need to access your information. For questions, please contact either Marketing's Web Communications group or UIT's Web Technologies group.

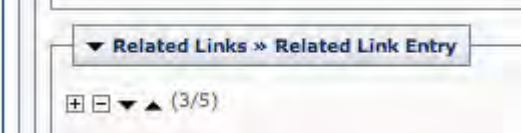
Creating Related Links sets


1. Click the **Edit tab** on the page you would like to place the **Related Links** into.
2. Scroll down to the **Related Links section**.
3. **Name** the set of Related Links by filling in the “*Related Links Header*” field. They can be named either “Related Links” or whatever may be logical for what they represent as a whole (e.g. as in the illustration below, “Art Links”).
4. Click on the drop down menu to **choose** if you want the related links section to appear on the **left, or the right** hand side of your page.
5. **Fill out at least one Related Link Entry.**
For each item you can **either**:
 - A. Use the CMS-browser icons to link to an item inside your area in the CMS (The CMS will display that item’s naming information as the link’s displayed text),
or
 - B. Enter the information for an external link. You will provide the link’s displayed text as well as the web address you want the item to link to.



6. Click the **Plus Sign button**  next to the **Related Link Entry area** to add additional link items. Repeat the process as desired to add more items to your set of links.

Note: It is generally recommended to keep the number of links in a set relatively small, say 3 to 7, and to keep the link text relatively short for quick and easy scanning by site visitors.

7. To **re-order items** in a set, click on the arrow buttons: 
8. To add any additional **sets of Related Links** which may be wanted, just click the **Plus Sign** near the top of every **Related Links area**. Follow the instructions above for each separate **set** of Related Links.

 **TIP:** You will notice that a number of different items within the CMS editing panels can be duplicated. If you see a **Plus Sign icon** inside an outline enclosing a **Data Definition**, then whatever is inside the “**Boxed Set**” can be duplicated as a whole piece. Pay attention to which items are boxed-in directly below the area’s name (e.g. “**Related Links**”) and which “**boxed**” items are nested inside another box (e.g. “**Related Link Entry**”). The **Plus Sign icon** will relate directly to the box it is immediately inside of.

Layout Preferences









CSS Override - For attaching an additional .CSS file (Cascading Style Sheet).

JavaScript Reference - For attaching an additional .JS file to add JavaScript to your page

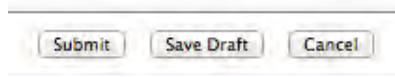
Code attached at the page level like this will be called from the page source and apply to this page only.

Column Display - Standard or Wide.

- **Standard** (the default view) provides the typical central column area as well as a narrower column on the right hand side. If you choose to use the Column image option (see “Banner and Column Images” above) you will need to have Standard selected here.
- **Wide** provides a wider central area by *removing* the right column area (and its content).

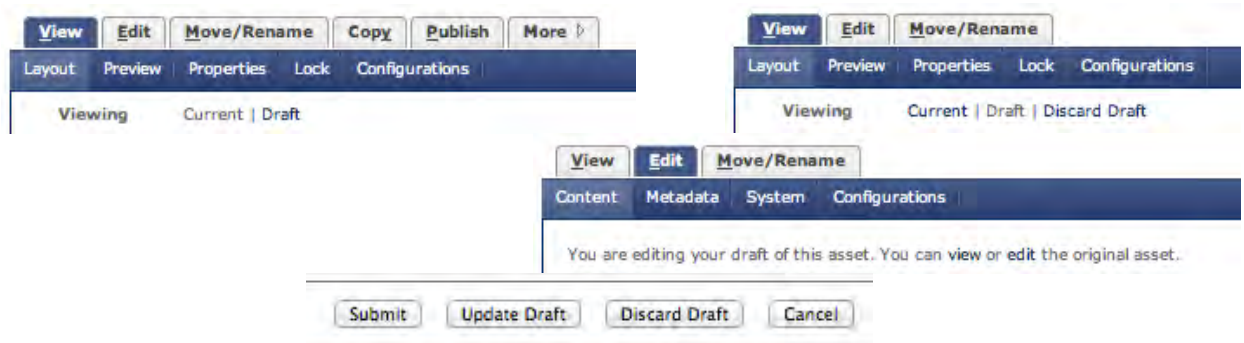
TIP: Internal Linking Tools (aka Browse icons) give you a hint as to what kind of asset they expect to link to - the icon:  page-type,  file,  block,  reusable external link; and the text inside the brackets tells you the path to the item that has been linked to – e.g.   [cms-basics/_images/cougar_village.jpg]

Working with Drafts




One choice for page assets is the option to save a **DRAFT**. Most Assets, including Pages, are saved within the CMS in such a way that anyone logging into the site can see the most current, up-to-date, active version of the asset. Draft pages are saved differently – and only the person for whom the Draft was saved will be able to see it and work with it, and only under their own login. With Cascade version 7, Drafts are saved automatically when the CMS detects a change – so pay close attention to whether you are editing the **active**, or the **draft** version of your page or asset.

A choice of whether to work on the Draft page or on the Current page will be indicated at the top of the Page's Information Panel view, and with options on how to save it at the bottom of the Editing panel. **Caution:** Choosing "Submit" for a Draft Page will activate it as the common, working page, overwriting the previously working version, and eliminating your Draft version.



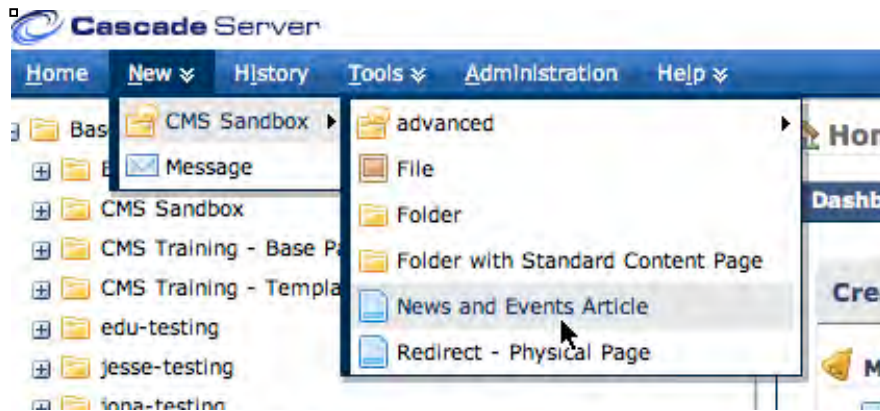
Creating News and Events Articles

 News and Events Articles are a specialized type of page-asset. The process for using this asset may vary by site, and only sites specifically requiring this feature will have it.

Please note that *News and Events Articles* will always be created within a specific folder (e.g. 'Your Site'/news/stories). This means that, unlike creating other new assets, a pre-selected folder location when you start to make *News and Events Articles* will not affect where the new item ends up being placed. When created, each article will receive an automatically numerically-incremented filename (*which you should rename to relate to the article's subject and date*). Articles located in the pre-defined directory will be automatically 'indexed' and thus their information will automatically appear on the page(s) designed to pull in and display the information from them (and links back to them), such as a specialized News and Events page.

GETTING STARTED

1. Select "New/YourArea/News and Events Article" from the main tool bar.
This will take you to a new page waiting for creation.



2. At the top of the editing panel, adjust the "System Name" field to the specific descriptive filename to be used for the article. The article file name may be set to a default (e.g. "article#") where the number (#) is incremented based on previously-existing articles.

Entering a specific file name is highly recommended, as it makes finding an existing article in the system much easier. Be sure to follow UH file naming conventions.

See p. 22: "Some Important Notes About Naming or Renaming Files and Assets"



3. Enter/select various fields/information as wanted, or as required . . .
Required: Display Name; Title; Teaser; Start Date from chooser.

Include a Sub Header; select the Dateline information (*effective date, hour and minute, AM/PM*); include a Location; and of course, populate the content => Article Copy . .
Required: Dateline from chooser; **Article Copy** (WYSIWYG content).

For notes on how to add content, see previous discussions, including *"The Content Editing Area(s) – and the Rich-Text WYSIWYG Editor"* on page 15.

4. Add in any optional article image(s) (*the recommended size is 362px x 263px*).

5. Add Contact information –
Required: all contact information fields need to be filled out for article to appear correctly on the "News Listing" page and the "Archive" page.

6. Select the "+" icon if there is more than one Contact, and the article Editing panel allows it.
7. Click "**Submit**" at the bottom of the editing window, and the page is created/saved.

If an automated Workflow is in place, your new article may be automatically Published. If not, you will then simply need to Publish both the article **and** the pages which are designed to pick up its information (headline, teaser, date, etc.) and display links to it (e.g. a specifically-designed News and Events indexing-page). If new images or other files are needed by the article, be sure they are Published as well.

Creating a Redirect Physical Page

This asset factory creates a “Physical Redirect Page”, which consists of a Menu-eligible Folder containing a Redirect page-type asset. The sole purpose of this type of asset is to allow your site visitor to see and select a Left-Nav Menu item from within one area of your site, and have them actually end up on a page in a different area of your site, or even in another site altogether. This way, the 'remote' page can be accessible from multiple locations without having to duplicate its content (and without having to separately update that content in multiple places)!



1. Select “**New / [YourArea] / Redirect - Physical Page**” from the Cascade menu bar.
2. **Change/Fill in the Display Name.** Note: Because this is a Redirect, your site visitor will not see this part. However, it may end up showing elsewhere (e.g. if referenced by a set of Related Links).
3. **Change/Fill in the Title field.** This will show up as the Menu item in the section where the Redirect sits.

 A screenshot of the 'New Page' form in the Cascade Server interface. The 'Create' button is visible at the top left. Below it are tabs for 'Content', 'Metadata', 'System', and 'Configurations'. The 'Metadata' tab is active, showing the 'Inline Metadata' section. This section contains four input fields: 'Display Name' (with the value 'Redirect - Physical Page'), 'Title' (with the value 'Redirect - Physical Page'), 'Keywords' (with a search icon), and 'Description' (empty).

4. **Finally, either:** Select the **browse icons** to create an **Internal link** within your CMS site; **or Fill in the URL** for the field labeled **External link** (where the remote page lives).

 A screenshot of the 'Redirection' form in the Cascade Server interface. The 'Redirection' tab is active. It contains two main sections: 'Internal Page' and 'External Link'. The 'Internal Page' section has a red minus sign icon, a blue document icon, and a pair of square brackets. The 'External Link' section has a text input field.

Publishing – The CMS Publisher

Simply put, the CMS Publisher has 2 basic jobs: 1) assemble your assets into their final form; *and* 2) either write them to, or erase them from, your site's server location(s).

(See also: p. 10 - TIP - "...page-assets do not yet have a file type...")

Note: Until an asset is published, no one outside the CMS can see it.
'Submit' saves your changes. 'Publish' makes a page or resource available to browsers.

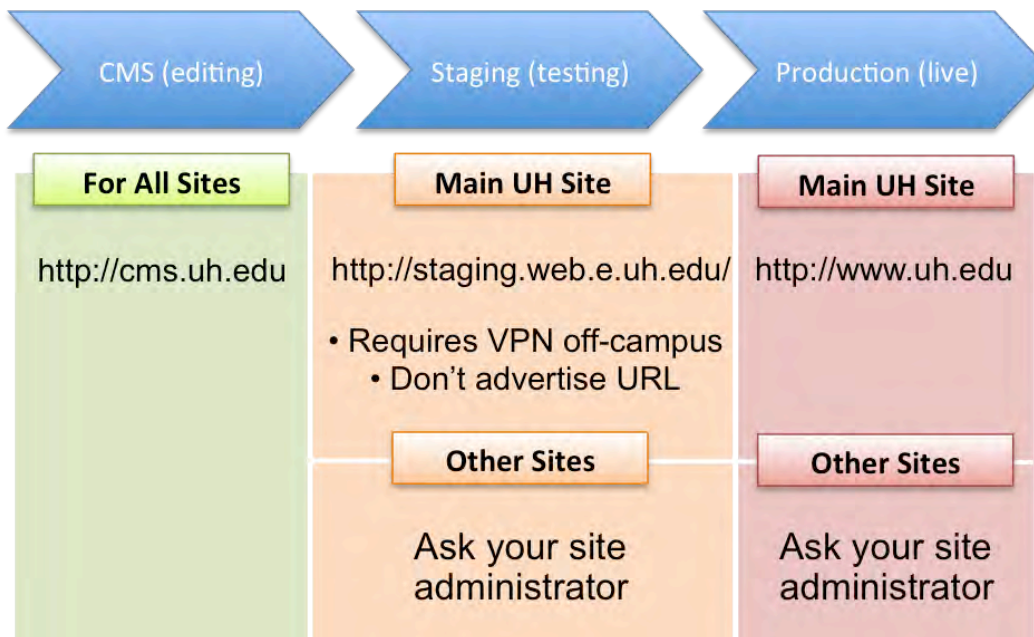
Before You Publish:

At the individual page level, you will need to click the Submit button at the bottom of each finished page you are editing to lock in any edits you have made. Next, check the WYSIWG preview. Changes which have not appeared in the Viewer-side Preview mode for the active page will not be captured in the final published page. (Draft pages do not publish.) When you are happy with the page, then you are first-finish ready. You are ready to move to the first step in the Publishing process.

Be aware that the Publishing process is approached in 3 steps, and for specific reasons.

The information above this section has centered around the CMS **Editing** process.

Further below, the **Staging => Live Publishing** steps are explained:



STAGING PUBLISHING

Publishing first to your site's **Staging area** allows you to preview your content in a browser and make any needed adjustments before your material is published out **LIVE**.

(See: <http://staging.web.e.uh.edu/yourarea> *** if your site is within the main *uh.edu* site.

For other sites, including college websites, ask your site administrator for the staging/testing URL.)

*** IMPORTANT !!

- **The staging arena is a UH-internal-only location** and you are required to be either on-campus or using UH-VPN to view this site. To acquire UHVPN, see: <http://www.uh.edu/infotech/downloads/>
- **PLEASE DO NOT SHARE YOUR "HIDDEN" URL(S) WITH THE PUBLIC:**
The staging/test version will not be seen by search engines, and is your chance to catch and fix any errors, or make any needed corrections, *before* the content goes live to the public.

STEPS FOR PUBLISHING

Whether you are publishing to the **Staging (which includes Testing)** or **Production (aka Live)** area of the server, the CMS Publishing procedure itself is basically the same – with a few important differences. The Publishing procedure follows:

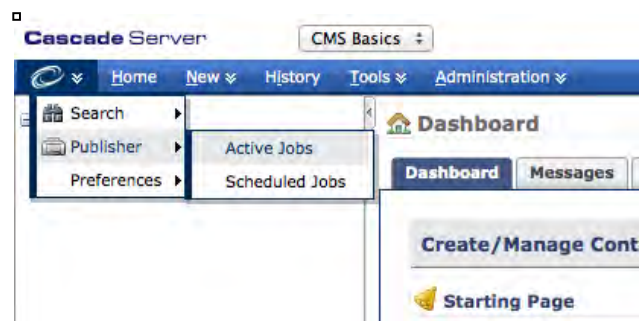
1. In the CMS, from the folder-view/asset-tree, you will locate and select the folder, page, or other item you want to publish.

Note: publishing a folder will publish all **publish-enabled** items contained inside of it, including nested folders. **To protect or prevent individual items from publishing, de-select that item's "include when publishing" option under each item's Edit tab.**

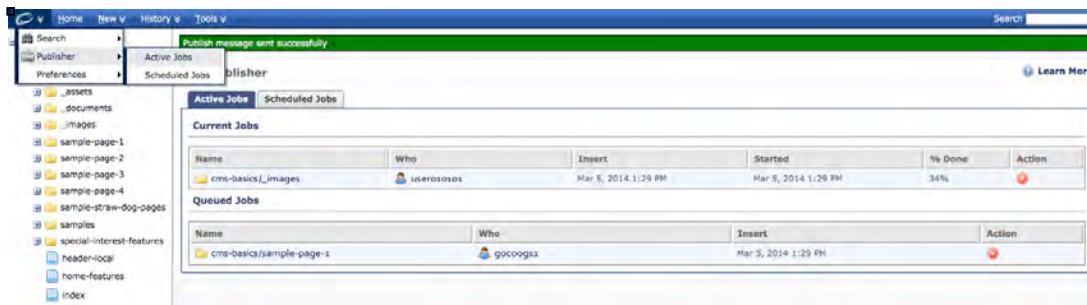
2. Click on the **Publish** tab:

If you are working in an established site you should see at least 2 Publishing Destinations. (Some sites may have more, depending on the needs of the individual site.) If your site has not “gone live” yet you may have only Staging (or Testing) destination(s).

3. **Ensure that you are only publishing to the Destination(s) you want !!**
To Publish only to Staging, make sure only the checkbox for Staging is “checked”.
Production = Live. Search engines are crawling these pages and gathering information.
Staging or Testing = Hidden. These pages are hidden from search engines.
4. **Under Options: Ensure Publish Mode is properly selected.**
Basically: Publish = write item to server; Unpublish = erase item from server.)
(A publish report is instructive and can be helpful, but is not required. Uncheck this option if you wish. The reports can be accessed from your Home/Dashboard view.)
5. **Click “Submit”.**
6. **Your request now goes into a queue.**
 The time it takes to publish new content may depend on how many other items are in the queue and the amount of material being published. You can keep track of your material's publishing status by viewing the Publisher queue, available under the Cascade menu.



The CMS Publisher's Queue



Note: simple items like individual pages sometimes publish so quickly that they may already be finished publishing by the time you open the Publisher queue.

- 7. After your material has published to the Staging server, review it for errors.**
If errors are seen or changes are wanted, return to the CMS asset's Edit mode to make the desired changes. Repeat the appropriate Publishing process steps.

When your material is the way you want it and is working correctly, then you are ready to Publish to your LIVE/Production area.

- 8. Review your materials on the Production server as well !!**
(your site's final live URL). If errors are seen or changes are wanted, return to the CMS pages' Edit mode to make the desired changes. Repeat the appropriate Publishing procedure steps.

Remember: For the sake of your site visitors, as well as in regard to search results, it is better to catch content errors BEFORE pages go LIVE.

“UN-PUBLISHING” and DELETING / MOVING / RENAMING

At some point you may want to either Delete, Move, or Rename a page asset or other assets from within your site, so it is important for you to understand the relationship which the CMS maintains between its internal assets and your published website.

When you request an asset to be Published, the CMS constructs and then writes the appropriate type of file to one or more of your site's designated server locations. Which location it goes to (e.g. Staging or LIVE) basically determines whether the page will be seen by site developers only, or by the general public, but to the CMS the process is basically the same either way: a file is written to a server location.

When the CMS is asked to “Un-Publish” a file, it tells its Publisher to delete/erase that file from the requested server location. The CMS-source asset remains intact within the CMS unless and until the CMS is specifically asked to Delete it using the Delete command under the "More" tab.

In fact, the structure of assets within the CMS is the only way the CMS has of instructing its Publisher what to do and how to do it. This means that once an asset is deleted from the CMS, the CMS no longer has any way to change (overwrite or delete) that asset's corresponding presence on the server. In fact, if a previously published asset is either deleted, renamed, or moved within the CMS without it first being unpublished, then an “orphaned file” will be left out on the server somewhere. An orphaned file in the Live area can cause search engines, or browser bookmarks, to access outdated results from your site.

It is easiest to Avoid Orphaned Files, so please Remember to UN-PUBLISH when Moving, Renaming, or Deleting Any File Or Other Assets In The CMS.

MISC - Troubleshooting

Getting rid of orphaned files:

If needed, you should be able to recreate the exact original file structure/path/filename **temporarily** within the CMS to act as a tool for the CMS Publisher to use to erase the relevant file(s). Remember to clear out the recreated folders/files from within the CMS after you have used them to erase the unwanted file(s)!

Retrieving a Deleted Asset:

If an asset has been deleted from within the CMS and you want it back, look first in the Recycle Bin available from the Home Page/Dashboard. Deleted files are retained for whatever amount of time the Site's Recycle Bin is set for. The default is 15 Days. Available settings are: 1 Day; 15 Days; 30 Days; Never. Please contact Web Technologies if you wish to change this setting for your site.

Retrieving a previous version of a Page:

In the Information Panel for a Page, under the "More" tab, you should see a Versions option. Within Versions, you may select a previous version of a page and reactivate it as the working version.

About the Feb 7, 2014 upgrade to version 7.8.4

NEW FEATURES

- **Cascade server now automatically saves a Draft** of assets as you are editing, instead of manually-only. ("Draft" versions are only available to the individual who created them, and do not publish.) Users still have the option to preserve the Draft or Submit it as the active asset (active = available to anyone with access for your site).
- **Versioning notes** – can now be added when submitting an asset, to help you keep track of significant changes.
- **Dashboard:** the Stale Content Report represents pages and files you have permissions for which have not been updated for a while. While this does not mean they are necessarily out of date, it can mean they are worth looking at to make sure. For pages which need to stay current, or which might update on an expected timeline, reviews can be scheduled to alert you: Go to the page, select the Edit tab, then Metadata; select a review date under "User Metadata".
- **Drag-and-drop File uploads:** You can now drag a file icon from your desktop onto the drag-and-drop area of the file editing dialog or zip archive tool, and the CMS will upload the file without your having to browse for it.
- **Relationships tab** – a reconception of the "Subscriptions" report; gives you information about what other assets may also need to be re-published when the asset you're working on changes, and gives you the option to publish, all-at-one-time, all the Related items. (Contingent on what assets you have permissions for.)
- **Log-out recall** – The CMS now remembers where you were in your site when you logged out, and drops you back there when you next login again.
- **In-Context Editing** – may be enabled after some decisions are made about the best implementation. Based on user permissions, some editing dialogs can be made available from the Preview mode (without having to go to Edit mode).
- **Anchored Submit panel** – The new version-notes field as well as Submit/Draft options now stay anchored within sight in your browser window as you edit, so you do not have to scroll down through a long stack of data definitions to find them.

KNOWN ISSUES

- **Some key functions (such as creating links) in the rich-text WYSIWYG Content Editors were not supported by Internet Explorer 11 – IE-11 browser** – *** We believe this glitch was resolved with the upgrade to Cascade v.7.12.2. If this or other issues still seems to be occurring, please contact us. ***
- **Some left-navigation menus** have shown some items specifically set to not display in menu – contact us if you see this happening in your site, as some of the site's menu-building assets will need to be tweaked.
- **PHP** – all Editor-added PHP must now be enclosed as in the following example (**bold green text**) or it will not render correctly:

```
<!--#START-CODE< }?php include('...') ?>#END-CODE-->
```
- **Skype** – if you have Skype installed, when you are working with telephone numbers in the WYSIWYG editor Skype may insert code which is not well-formed (may split a SPAN), thus generating an error message and preventing the code from being submitted as a final version until the code is fixed.

Please let us know if you are finding issues (or advantages!) to how the new features work – we appreciate hearing about how things are working for you with the upgrade(s).

NOTES

The CMS was upgraded to version 7.10.2 on August 1, 2014, to version 7.12.2 on November 14, 2014, and upgraded from version 7.12.3 to 7.14.2 in October 2017. An upgrade to version 8.x is anticipated sometime in 2017. The version 8 upgrade will represent some reorganization of tools inside the CMS interface, although basic functionality should all still be there. Ultimately, upgrades should improve performance in several ways. As always, please let us know when upgrades bring you things that make your life easier, harder, or raise questions for you!