

Clemson University Cascade Server

Web Content Management System

Steps, Tips and Tricks

**For Contributors and Publishers
Clemson University Brand 2009**

Cascade Server is a Web-based content management system for maintaining Web sites. Cascade Server gives content providers the ability to create and edit Web content from any computer with a Web browser and Internet access. **Cascade is a tool for managing Web content, but to create functional, informational, audience-oriented and aesthetically pleasing Web sites, it is important to understand Web best practices.** The American Bar Association Web site provides an excellent best practices manual.

http://www.abanet.org/nabe/communications/bestpractices/site_management/best_practices.html

Getting Help

In addition to using Cascade's help menu, these sites offer additional user information.

Alphabetical listing of subjects - <http://www.hannonhill.com/new-kb/>

Glossary of Cascade terms - <http://www.hannonhill.com/new-kb/glossary.html>

Glossary of Internet terms - <http://www.sharpened.net/glossary/index.php>

Glossary of Web terms - <http://www.cwru.edu/help/webglossary.html>

Online training videos

Complete video listing: <http://lite.hannonhill.com/new-kb/videos/index.html>

Cascade End User Walkthrough: http://www.hannonhill.com/files/flash/cascade/enduserwalkthrough_final.html

Product Demo: http://www.hannonhill.com/files/videos/product_demo.swf

Inline Spell Checker: http://www.hannonhill.com/files/videos/inline_spell_checker.swf

Personalized help for Clemson Cascade users:

Web form: <http://www.clemson.edu/ows/requests>

E-mail: web_services-l@clemson.edu

Phone: 864-986-0608

Clemson Cascade blog:

<http://blogs.clemson.edu/cascade/>

Table of Contents

Getting Help2

Login.....6

Dashboard6

 System Menu 7

 Home..... 7

 New..... 7

 History..... 7

 Tools 7

 Help 7

User Preferences.....8

Creating Assets in Cascade.....9

 Folder Asset..... 9

 Page Asset 11

 File Asset 13

Viewing, Editing and Copying Folders 17

 View Pane..... 17

 Edit Pane..... 18

 Copy Pane..... 18

Publishing and Deleting Folders..... 19

 Publish Pane 19

 Delete Pane..... 20

 Advanced Pane 21

Viewing, Editing and Copying Pages..... 21

 View Pane..... 21

 Edit Pane..... 22

 Copy Pane..... 24

Publishing and Deleting Pages 25

 Publish Pane 25

 Delete Pane..... 26

 Advanced Pane 27

Additional Page Elements 28

 Inserting Images, Links and Tables..... 28

Other useful tips:..... 28

Components of a Web Site

A Web site is a collection of folders, pages, files, documents and digital assets (images, videos, etc.). The components of a Web site are stored on the hard drive of one or more computers, called Web servers. Web servers use special software that is configured to “serve up” the components of a Web site. Computers like those in our homes and offices are called client computers. Clients connected to the Internet access a Web site when Web browsing software is launched and the site’s address is entered.

The first page you see when you go to a Web site is the home page. The home page is a file, usually named index. The index page is like a welcome mat inviting visitors in to view the whole site. Links from the index page provide an easy way for visitors to navigate to other pages within the site. The home page is an entry point, or gateway, to various sub-sites within the main site. The components of a sub-site are contained in a folder. The folder name is the name of the sub-site. Sub-site folders often contain a home page, also named index. When you point your Web browser to <http://www.clemson.edu>, an index page is displayed in your browser window. To view the home page for a sub-site, add a slash (/) followed by the name of the site, like <http://www.clemson.edu/academics>. This will display the index page for the Academics Web site, a sub-site of the Clemson University Web site.

A web page is a document written in a language that can be translated by Web browsing software like Internet Explorer, Firefox, Safari and others. There are a variety of languages that can be translated by Web browsing software, but the most predominant language is html. HTML is the acronym for **hypertext markup language**. HTML uses tags to mark up the content on a Web page and tell the Web browser how the elements of the page should look.

Cascade Server Definitions

Users

Users are the people who use Cascade. Each user has an account based on username, password, full name, email, group and role membership. The group and role membership determines the privileges a user has in the system and grants access to system resources.

Groups

A Group is made up of one or more users with common roles. Groups are created and populated by Administrators. Each user in the system must be granted membership in at least one group, and can be granted membership to multiple groups.

Roles

Roles outline the access rights for individual users. The default roles include Contributor, Approver, Publisher, Manager, and Administrator.

Assets

The pages, folders, files (such as pdf or image), templates, stylesheets and other components of a Web site.

Versions

Any time an asset is created or edited, Cascade automatically creates a new version of the asset and saves the previous version. Up to 50 versions at a time will remain in the Cascade database. Versions can be manually deleted, but after 50 versions have been saved the oldest version will be deleted automatically each time a new version is created.

Publishing

Assets submitted into Cascade are available for viewing only in Cascade. To view your pages in a Web browser they must be published to the Clemson Web servers. Users in a Contributor role do not have publish rights. Publishing is available to the Publisher and Manager roles.

Cascade End User Walkthrough

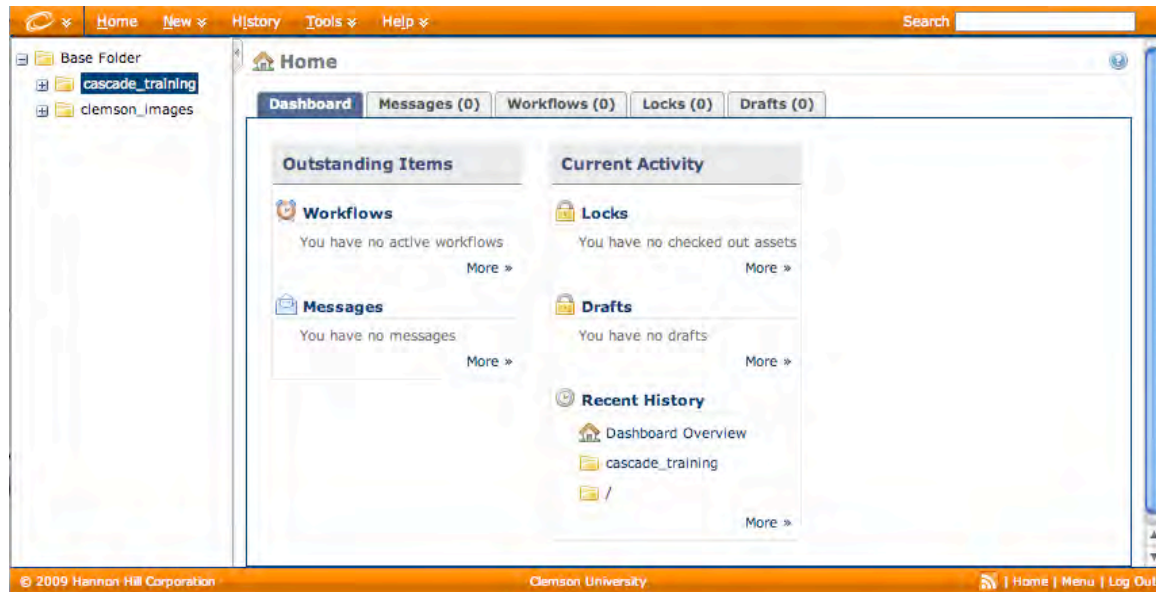
Visit this link http://www.hannonhill.com/files/flash/cascade/enduserwalkthrough_final.html to see a short overview video of the Cascade user interface.

Login

Cascade can be accessed from any Web browser pointing to <http://cascade.clemson.edu/>. Log in with your Clemson University employee userid and password.

Dashboard

When you log in you are taken to your custom home page, called the **Dashboard**. The dashboard provides a snapshot of your available asset creation types, messages, workflows, checked-out assets and history. Return to this area any time by clicking the **Home** button on the Cascade menu bar.

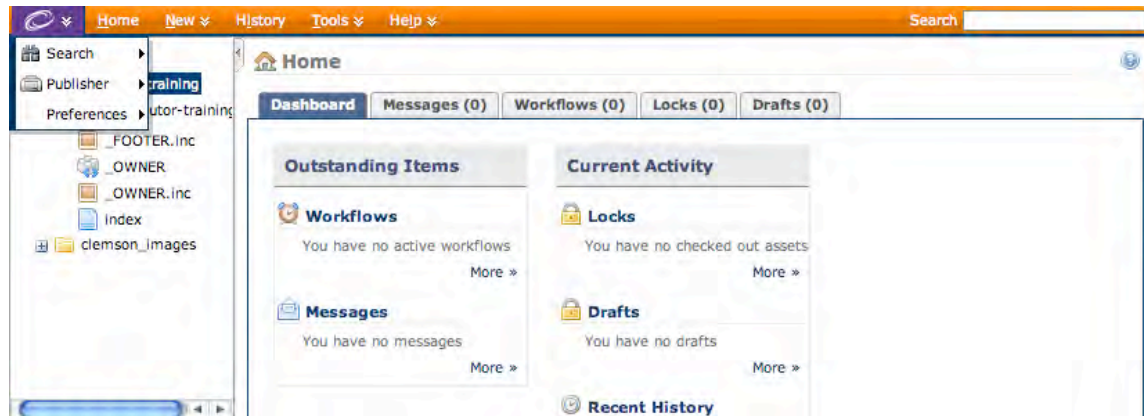


For complete detailed instructions, see <http://www.hannonhill.com/new-kb/concept.html>

Menus

System Menu

Choose the System menu to access Cascade's search feature, publisher queue and user preferences.



Home

Choose the Home menu from anywhere in Cascade to go back to your Dashboard.

New

Choose the New menu to view a complete list of assets you can create.

History

Choose the History menu to view a list of the last items you accessed. The number of items displayed can be changed in your User Preferences.

Tools

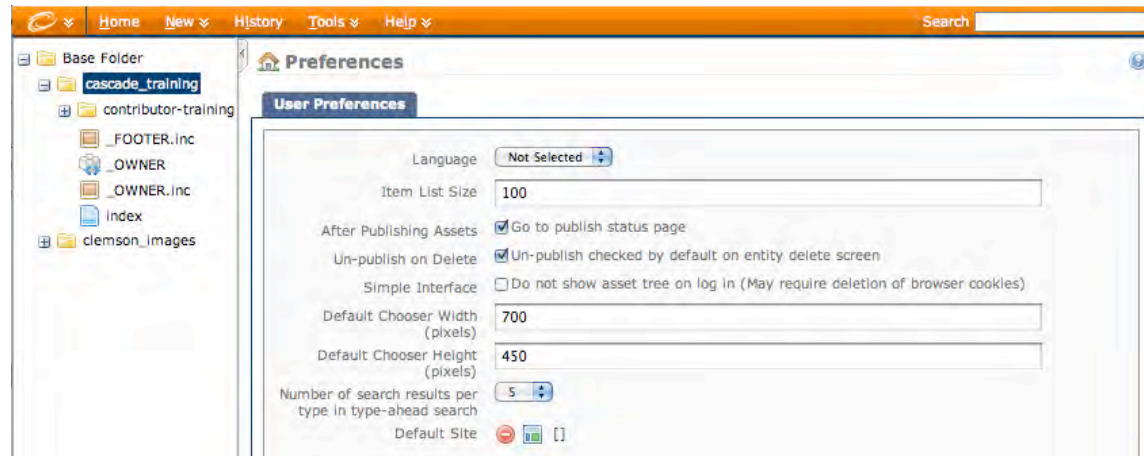
Choose the Tools menu to access Cascade's custom tools such as zip archive.

Help

Choose the Help menu to access a variety of support options.

User Preferences

Users can customize some of the options available in Cascade.



Language – Displays language options. If none is selected, English will be used.

Item List Size – Sets the number of items shown in history and folder contents.

After Publishing Assets – When this box is checked, Cascade will open the publish queue window each time you publish an asset so you can see the location of your asset in the publish queue relative to all the other recently published assets. The publish queue window is also available from the System Preferences drop down menu.

Un-publish on Delete – When this box is checked, Cascade will automatically unpublish from the Web server any assets you are deleting from Cascade. It is important to unpublish assets from the Web prior to deleting them from Cascade.

Simple Interface – When this box is checked, Cascade will hide the asset tree upon login. Unhide the asset tree by clicking the asset tree toggle tab.

Default Chooser Width – Sets the width in pixels for all chooser windows.

Default Chooser Height – Sets the height in pixels for all chooser windows.

Number of search results – Sets the number of items for each item type that is displayed when performing a type-ahead search (from the Search field on the menu bar or the System Preferences drop down menu).

Default Site – Sets the default site if utilizing the Cascade Sites option.

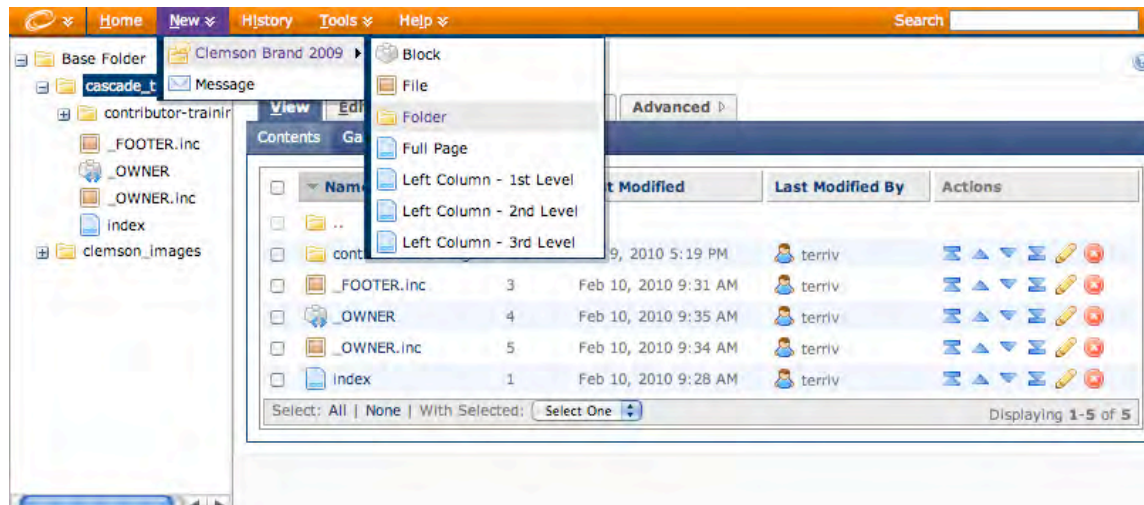
Creating Assets in Cascade

Folder Asset

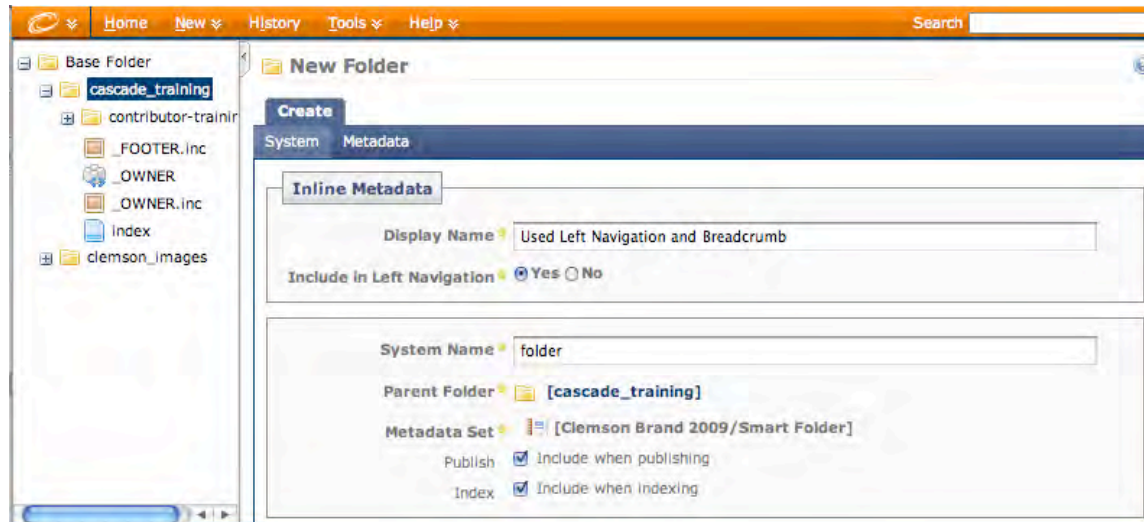
Folders help keep your site organized by grouping similar items together. Each Web site has a parent folder that contains all the assets belonging to the site. The folder's system name becomes the URL for the site. Every Web site has one parent folder but you can create many folders within the parent folder. Examples of folders that are created in the parent folder are the **documents** folder and the **images** folder. The folder asset is represented by a manila folder icon.

To create a new folder:

1. Choose New -> Clemson Brand 2009 -> Folder from the menu bar.



2. The Clemson Brand 2009 folder creation window will open.



3. The folder's System window pane includes:

- a. Display Name – Textual description of the folder contents.
- b. Include in Left Navigation – Folder's Display Name listed in the left navigation even if it lives in a folder that is not indexed.
- c. System Name – Unique, Web-friendly (lowercase, no spaces, one or two words either run together or separated by a hyphen) name. The System Name becomes the folder's URL.
- d. Parent Folder – Folder where the new folder will be placed. To change the placement of the new folder, select the parent folder icon and navigate to the preferred folder.
- e. Publish – When checked, the folder is available to be published.
- f. Indexing – When checked, the folder's Display Name is listed in the left navigation.

4. Choose Submit. The folder will appear in your asset tree.

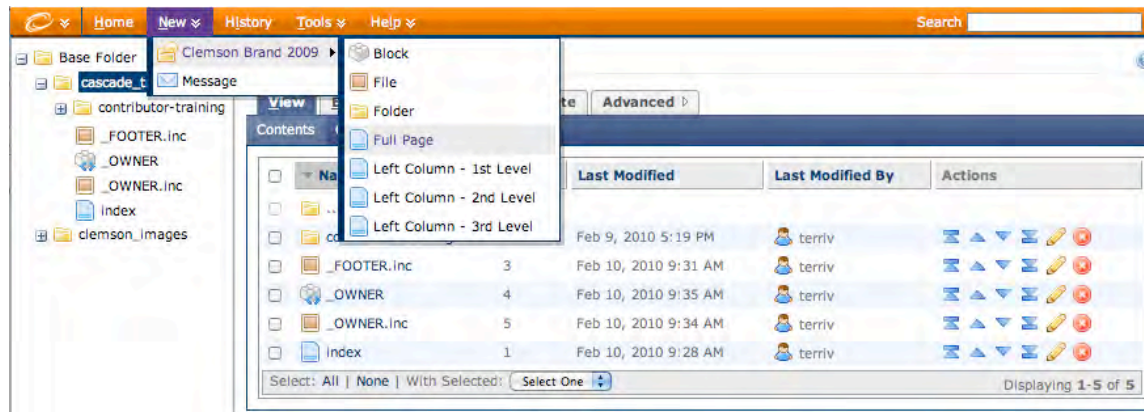
Every folder that will be listed in the left navigation must contain an index page.

Page Asset

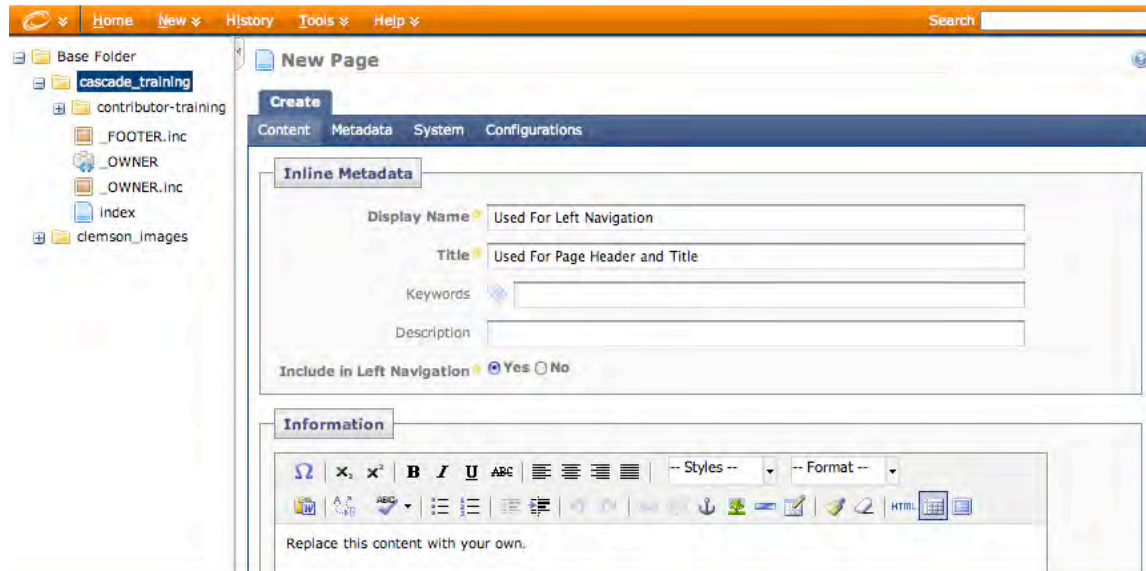
Pages contain the textual and visual information you want to display on your Web site. The folder's system name becomes the URL for the site. Every Web site has one parent folder but you can create many folders within the parent folder. Examples of folders that are created in the parent folder are the **documents** folder and the **images** folder. The page asset is represented by a blue sheet of paper icon.

To create a new page:

1. Choose New -> Clemson Brand 2009 -> from the menu bar.



2. Select the page type you want to create.
 - a. Full page – no left navigation.
 - b. Left Column 1st level – left navigation displays assets in 1st level folder.
 - c. Left Column 2nd level – left navigation displays assets in 2nd level folder inside 1st level folder.
 - d. Left Column 3rd level – left navigation displays assets in 3rd level folder inside 2nd level folder.
3. The New Page creation pane will open to the Content window.




4. The New Page Content window includes:

Inline Metadata

- a. Display Name – Like the folder asset, the page asset's Display Name is listed in the left navigation.
- b. Title – Underlined heading at the top of the page. Browser window title.
- c. Keywords – Used by search engines. Keywords are short descriptions of the page content.
- d. Description – Used by search engines. Descriptions are longer descriptions of the page content that are displayed in the results of a Web search.
- e. Include in Left Navigation – Page's Display Name is listed in the left navigation.

Information

- f. Text editor (WYSIWYG) toolbar – Used to format page content.
- g. Content window – Where content is created.
 - i. Type your textual content or copy/paste from another text editor like Microsoft Word. Note: when inserting text copied from another text editor, choose the Insert from Word icon  on the WYSIWYG toolbar to remove unnecessary formatting that will affect how your content is displayed.
 - ii. Insert elements such as hyperlinks, images and tables to enhance your page.

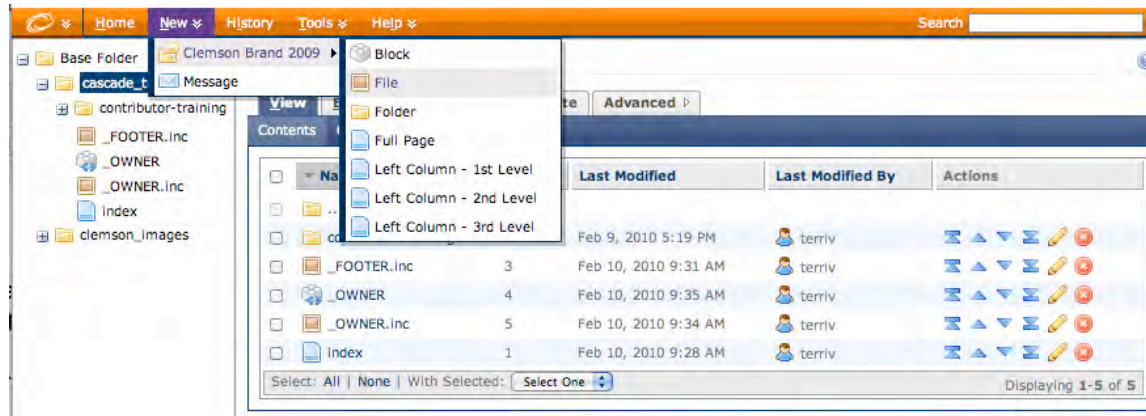
5. The page's Metadata pane includes Advanced Options. Selected options will be checked by Cascade before allowing the page to be submitted.
6. The page's System window pane includes:
 - a. System Name – Unique, Web-friendly (lowercase, no spaces, one or two words either run together or separated by a hyphen) name. The System Name becomes the page's URL.
 - b. Parent Folder – Folder where the new page will be placed. To change the placement of the new page, select the parent folder icon and navigate to the preferred folder.
 - c. Content Type – Not used with Clemson Cascade.
 - d. Configuration set – Collection of configurations used for building pages. Clemson's configuration sets include Full Page and Left Column.
 - e. Publish – When checked, the folder is available to be published.
 - f. Indexing – When checked, the folder's Display Name is listed in the left navigation.
7. The page's Configuration window displays all the Cascade components that are used to create the page, including the template.
8. Choose Submit. The page will appear in your asset tree.

File Asset

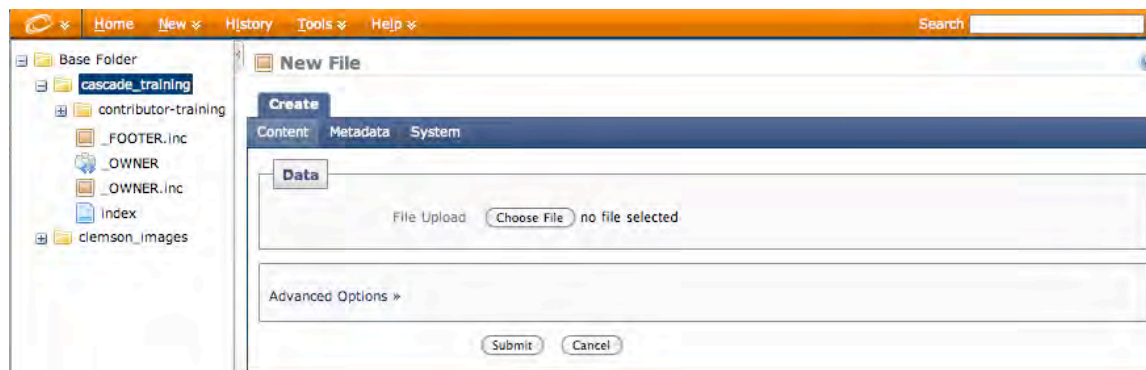
Files are assets used to visually and functionally enhance Web pages. They are typically created by external programs and imported for use in Cascade. Some files, like image and video files, can be viewed in a Web browser. Other files, like .doc, .xls and .pdf files, usually need to be downloaded and viewed in their respective programs. There are plug-ins that allow some types of files to be displayed in a Web browser but they must be installed manually. Creating a file in Cascade is really just uploading an existing file from another location, like your local hard drive. Image files (jpg, png, gif), video files (mov, flv), document files (pdf) and script files (js, php) are all uploaded to Cascade the same way.

To create a new file:

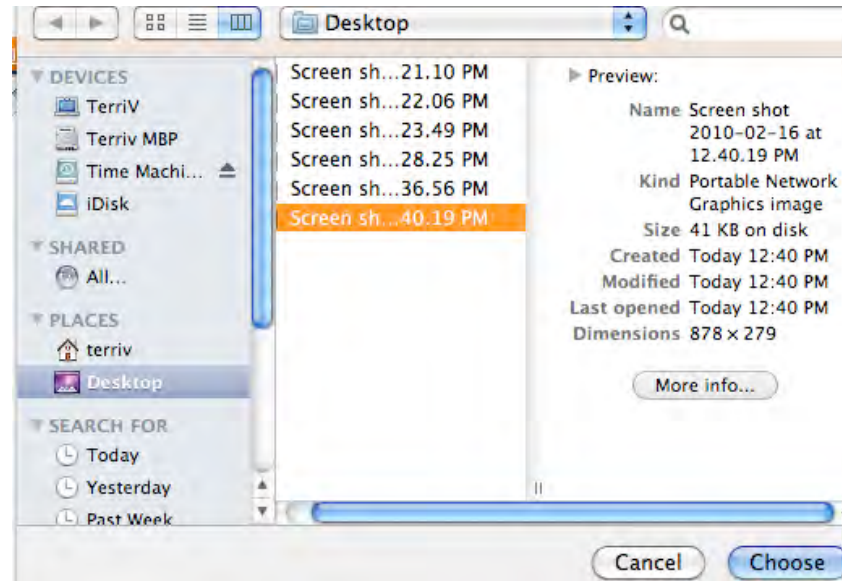
1. Choose New -> Clemson Brand 2009 ->File from the menu bar.



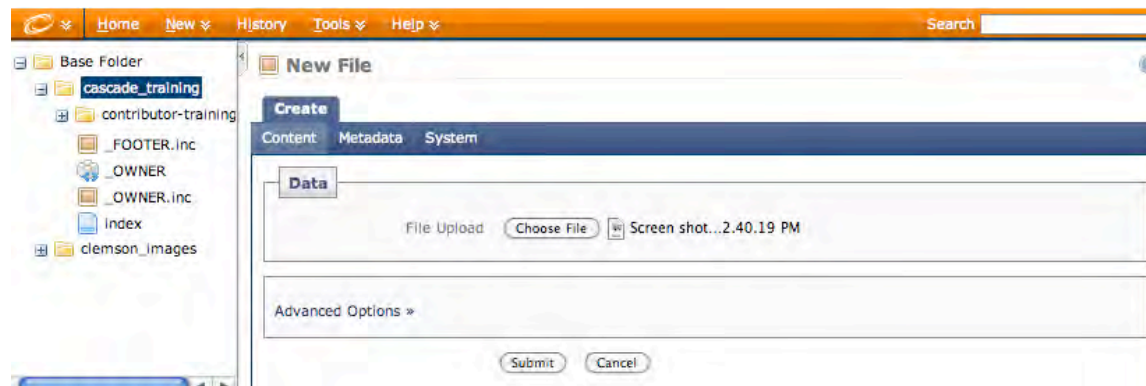
2. The New File creation window will open to the Contents window.
3. Select the Choose File button.



4. Navigate to the file you want to upload to Cascade.

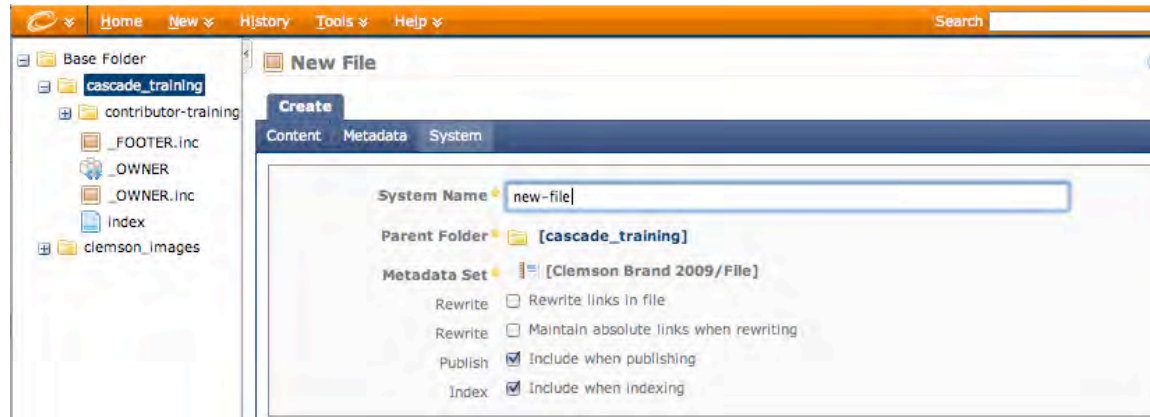


5. Select the Choose button. The name of the file you selected is now visible.



6. Select the System tab.

7. Enter a Web-friendly System Name

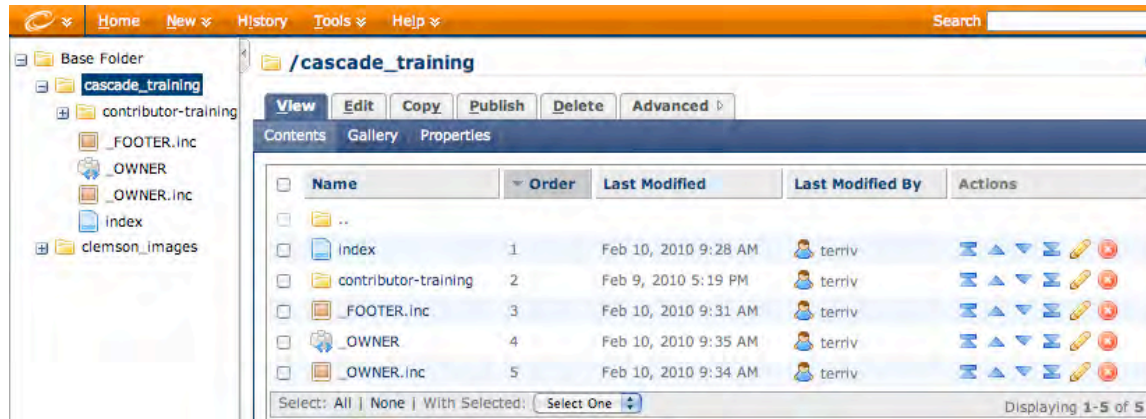


8. Choose the appropriate parent folder. Images should be placed in the images folder, documents in the documents folder, etc. If you select the appropriate folder before choosing the New -> Clemson Brand 2009 ->File from the menu bar, the file will automatically upload to the correct folder.
9. Check the box for the Rewrite links in file option if your file contains hyperlinks that must be rewritten so they work in Cascade.
10. Check the box for the Maintain absolute links when rewriting option if your file contains hyperlinks that must remain absolute links.
11. Check the box for the Publish option if your file should be available for publishing.
12. Check the box for the Index option if your file will be included in the left navigation.
13. Choose Submit. The file will appear in your asset tree.

Viewing, Editing and Copying Folders

View Pane

Select the folder to display the contents in the asset tree and in the main window.



The Contents window is the default view of the folder. Here you can sort by Name, Folder Order, Last Modified Date and Last Modified By User. To rearrange the order your assets are displayed in the left navigation:

1. Select the Order button to sort the assets by order number.
2. Move your pointer into a blank area to the right of the asset you wish to reorder. Your pointer will become a horizontal bar and arrow.
3. Click the left mouse button and hold to drag the asset up or down. You can also use the Actions up and down arrows.

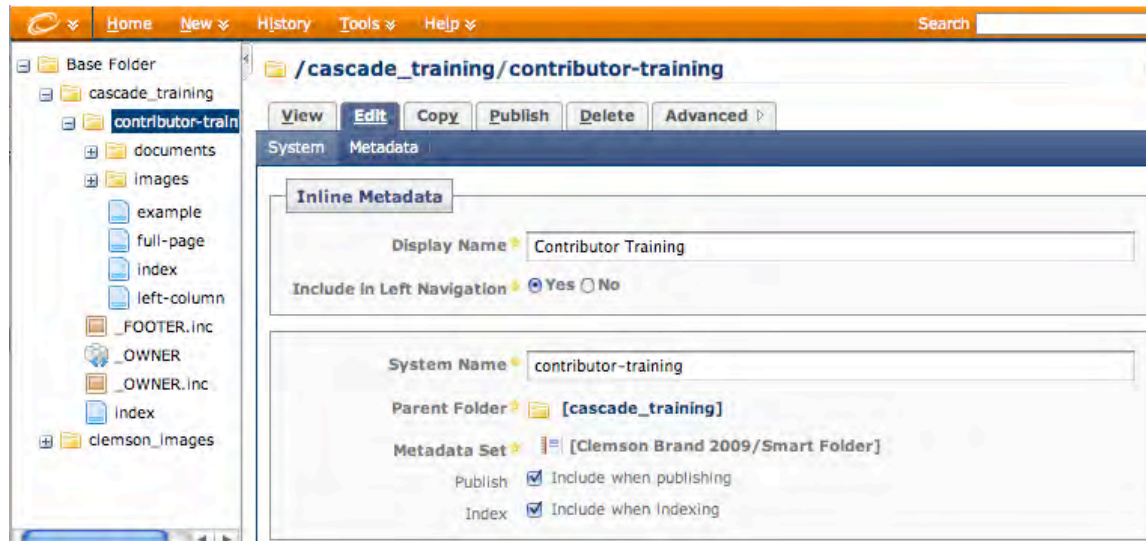
This only changes the order in which your assets appear in the left navigation. Your assets will always appear in alphabetical order in your asset tree.

The Gallery window displays thumbnails of images within a folder. If there are no images in the folder, the system will simply display the message "There are no images in this folder."

The Properties window displays additional information about the folder.

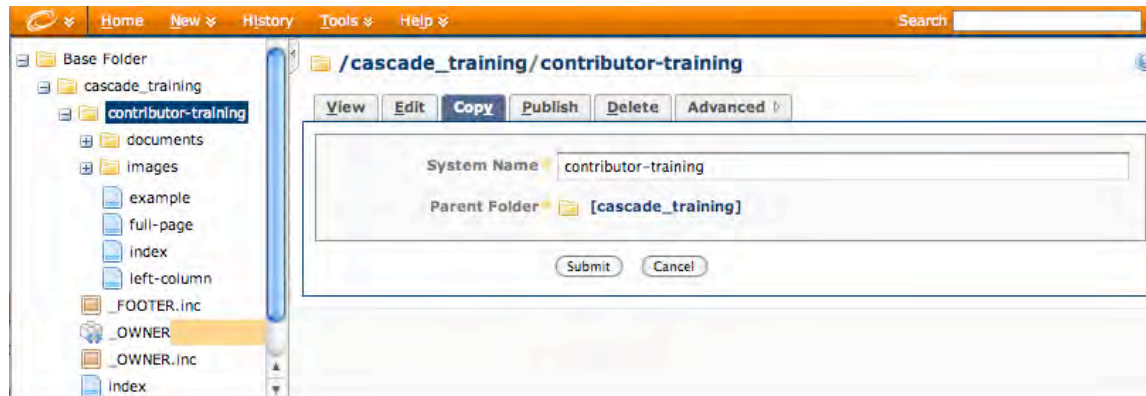
Edit Pane

Select the Edit pane to change information for an existing folder.



Copy Pane

Select the Copy pane to duplicate an existing folder. Choose a new system name for the folder and assign to the appropriate parent folder. The new folder will retain the same access rights as the copied folder.



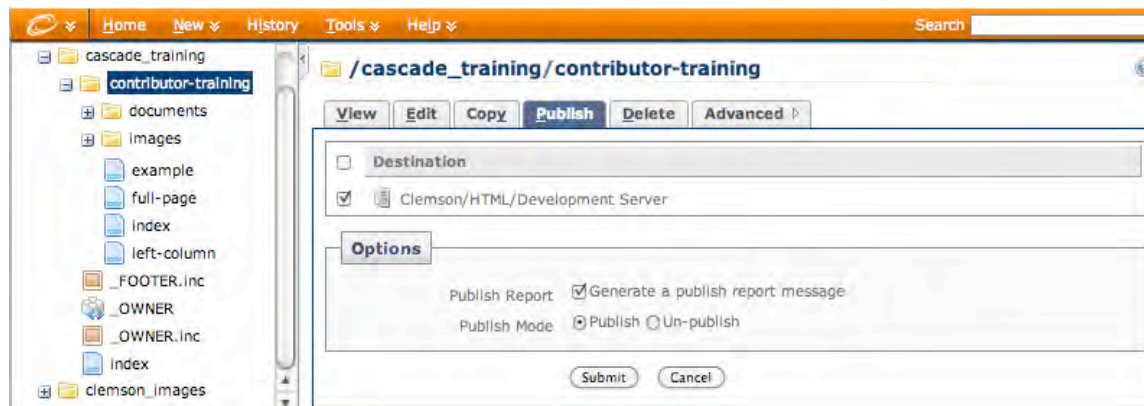
Publishing and Deleting Folders

Publish Pane

Folders are published to the Web from the Publish pane. Publishers, Managers and Administrators can access the Publish pane. When you publish a folder, every publishable asset in the folder will be published to the Web.

To publish a folder:

1. Select the folder from the asset tree.
2. Select the Publish pane.



3. The Publish window will open.

The Publish window includes:

Destination panel – Web servers where you can Publish or Un-publish your folder

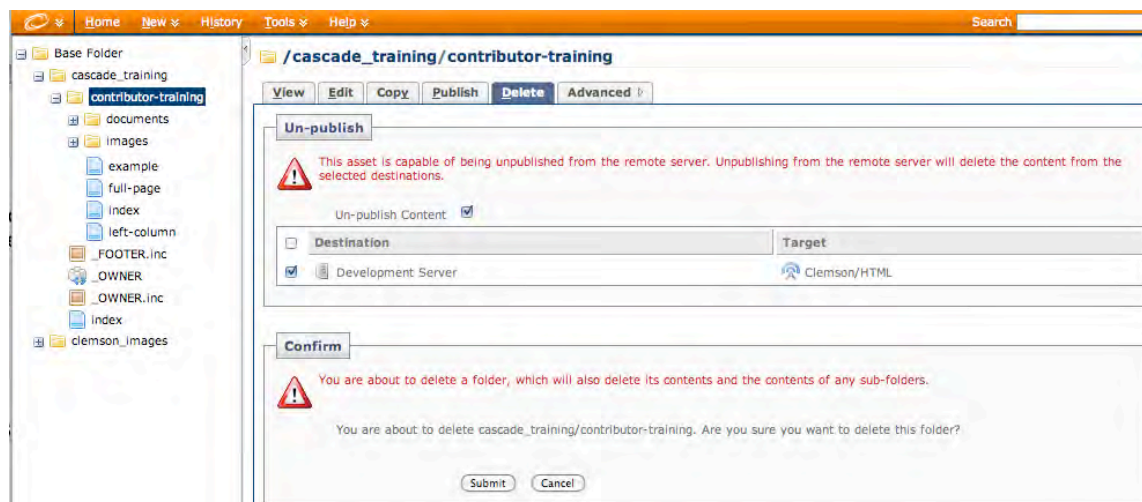
Options panel – Choose to receive a publish report message from Cascade, viewable in your Messages inbox.
Choose to Publish or Un-publish your folder. Cascade defaults to the Publish option.

4. Choose Submit. Your folder will enter the publish queue and the Publish queue window will open.
5. Once your folder has published, the pages within it can be viewed in a Web browser.

Delete Pane

Folders are deleted from Cascade from the Delete pane. Cascade grants all roles access to the Delete pane by default however Managers can choose to remove delete access from the Contributor, Approver and Publisher roles. To delete a folder:

1. Select the folder from the asset tree.
2. Select the Delete pane.
3. The Delete window will open.



4. The delete window includes:

Un-publish panel – Un-publish Content option is checked by default. Cascade will unpublish the folder from all Web servers and delete the folder, and all assets within the folder, from the Web.

Confirm panel – Notifies user that the folder and all folder contents will be deleted. The Confirm panel will also notify you about any other assets that may be affected by deleting the folder, such as those that have links pointing to the folder or any assets within the folder.

5. Choose Submit. The folder, and all assets within the folder, will be deleted from Cascade and from the Web.

Advanced Pane

The Advanced pane displays the Reference menu. The Reference window displays the folder's System Name and Parent Folder.

Viewing, Editing and Copying Pages

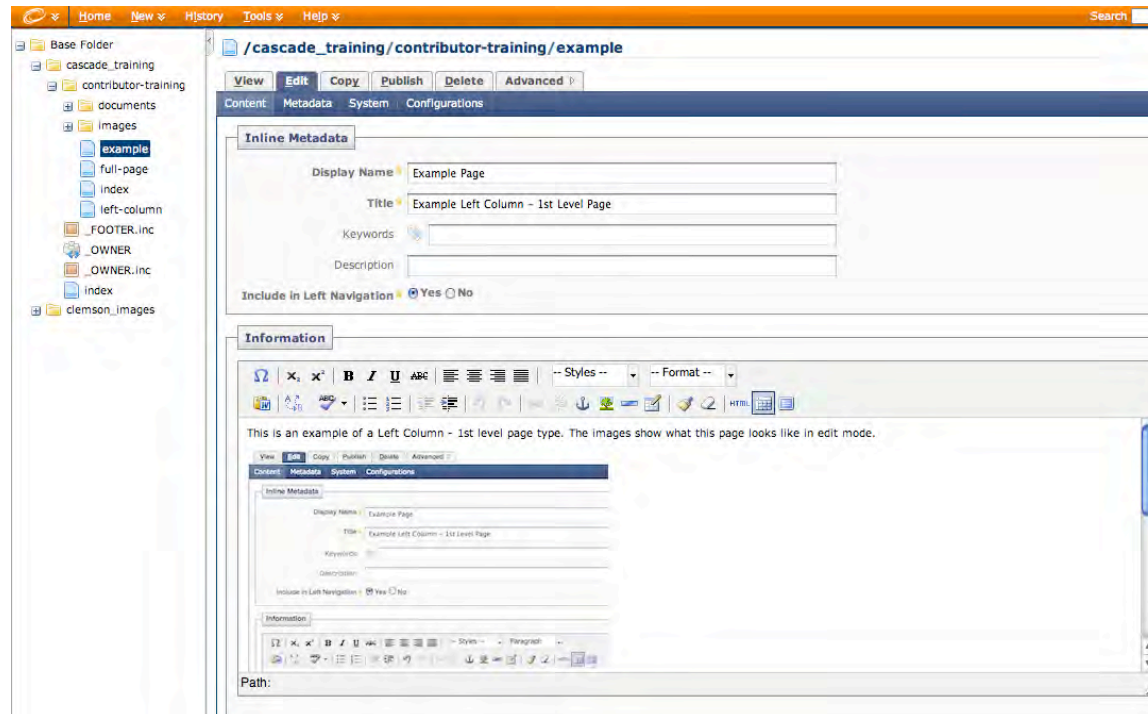
View Pane

Select the page to view it in the main window.

The screenshot displays a web content management system interface. On the left, a file explorer shows a tree structure with folders like 'Base Folder', 'cascade_training', and 'contributor-training', and files like 'example', 'full-page', 'index', and 'left-column'. The main window shows the 'example' page in 'View' mode. The page content includes the 'CLEMSON UNIVERSITY' logo with the tagline 'DETERMINED SPIRIT', a search bar, and a breadcrumb trail: 'Clemson Home > Cascade Training > Contributor Training'. The page title is 'Example Left Column - 1st Level Page'. Below the title, there is a paragraph: 'This is an example of a Left Column - 1st level page type. The images show what this page looks like in edit mode.' Two smaller windows are open below the main content, showing the 'Advanced' pane for the page. The left window shows 'Initial Metadata' with fields for 'Display Name' (Example Page), 'Title' (Example Left Column - 1st Level Page), 'Keywords', and 'Description'. The right window shows 'System' information, including 'System Name' (example), 'Parent Folder' (cascade_training/contributor-training), 'Content Type' (Left Column - 1st Level), 'Configuration Set' (Clemson Brand 2009/Left Column - 1st Level), 'Metadata Set' (Clemson Brand 2009/Smart Subpage), 'Data Definition' (Left Column - 1st Level), 'Rewrite Links' (Maintain absolute links when publishing), 'Publish' (Include when publishing), and 'Index' (Include when indexing).

Edit Pane

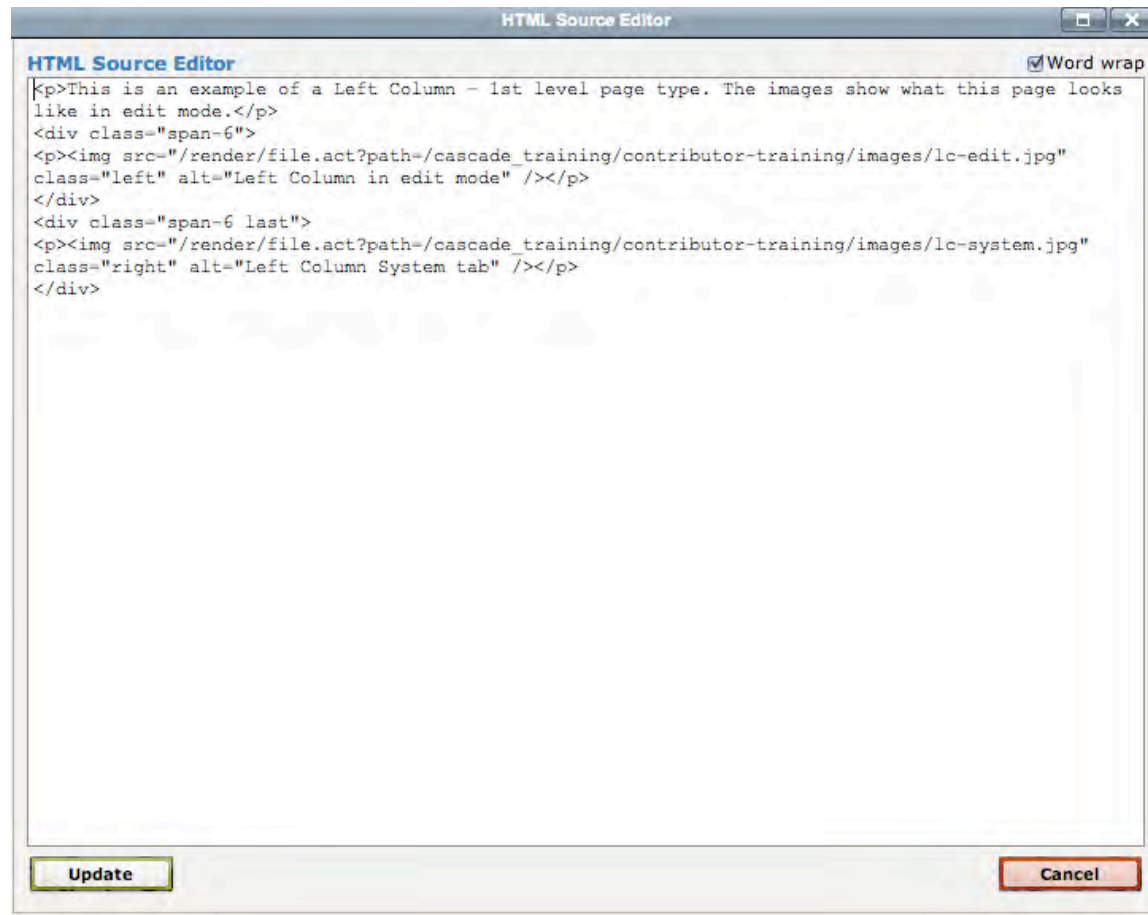
Select the Edit pane to edit content for an existing page.



Edit the content just like you created the content. You can edit the metadata, content or system information. Once you have finished editing your page, choose the Submit button to save your page to Cascade. Publish the page to see the changes when you view your page in a Web browser.

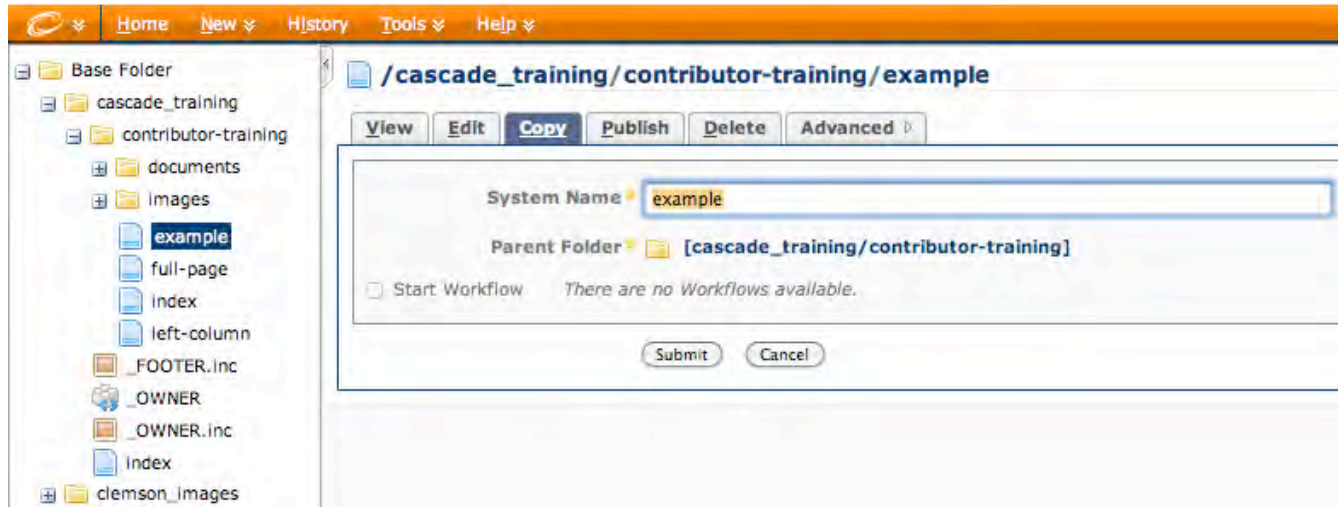
If you prefer to edit the HTML, choose the HTML button on the WYSIWYG toolbar to open the HTML Source Editor window. You can edit your HTML directly in that window, or copy and paste the HTML to your desired editor and then back into the Cascade HTML editor when you are finished. Choose the Update button to apply your changes to the page and then the Submit button to save your page to Cascade.

Note: Several of the new brand 2009 styles available for customizing page content require HTML editing. See the Web style guide at <http://www.clemson.edu/style-guide> for more information.



Copy Pane

Select the copy pane to duplicate an existing page. Choose a new system name for the page and assign to the appropriate parent folder. The new page will retain the same access rights as the copied page.



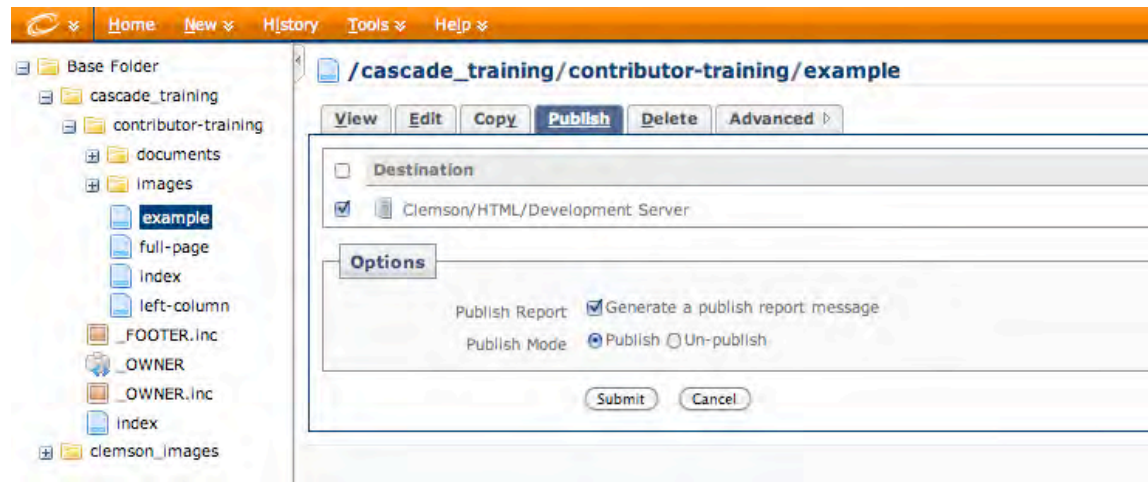
Publishing and Deleting Pages

Publish Pane

Pages are published to the Web from the Publish pane. Publishers, Managers and Administrators can access the Publish pane.

To publish a page:

1. Select the page from the asset tree.
2. Select the Publish pane.



The Publish window includes:

Destination panel – Web servers where you can Publish or Un-publish your page

Options panel – Choose to receive a publish report message from Cascade, viewable in your Messages inbox.
Choose to Publish or Un-publish your page. Cascade defaults to the Publish option.

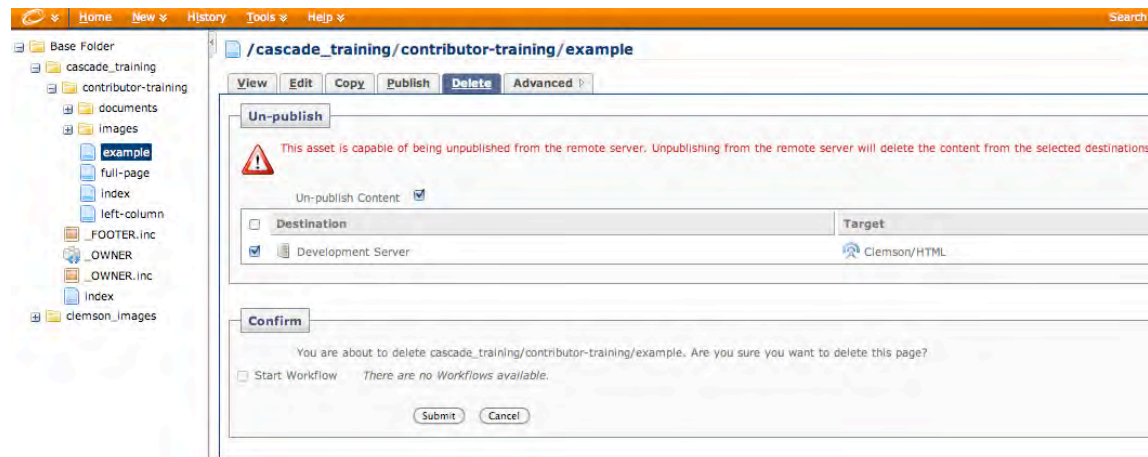
3. Choose Submit. Your page will enter the publish queue and the Publish queue window will open.
4. Once your page has published, it can be viewed in a Web browser.

Delete Pane

Pages are deleted from Cascade from the Delete pane. Cascade grants all roles access to the Delete pane by default; however, Managers can choose to remove delete access from the Contributor, Approver and Publisher roles.

To delete a page:

1. Select the page from the asset tree.
2. Select the Delete pane.
3. The Delete window will open.



4. The delete window includes:

Un-publish panel – Un-publish Content option is checked by default. Cascade will unpublish the page from all Web servers and delete the content from the Web.

Confirm panel – Notifies user that the page will be deleted. The Confirm panel will also notify you about any other assets that could be affected by deleting the page, such as those that have links pointing to the page.

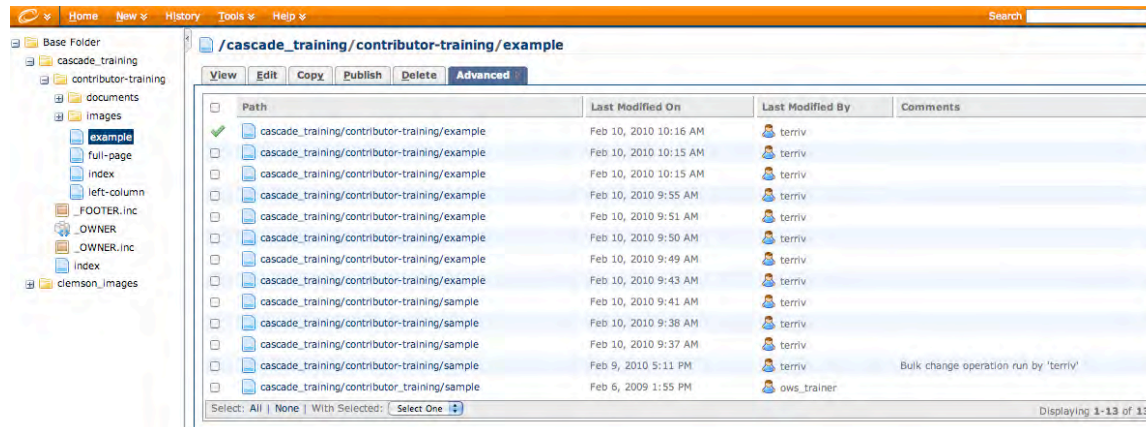
5. Choose Submit. The page will be deleted from Cascade and from the Web.

Advanced Pane

The Advanced pane displays the Reference menu and the Versions menu.

The Reference window displays the page's System Name and Parent Folder.

The Versions menu displays up to 50 versions of pages you have submitted to Cascade. A green checkmark indicates the current version. View previous versions by selecting the link in the Path column. The version will be displayed in the View window. Revert to a previous version by choosing Activate. Versions other than the current version can be deleted. Select the version and choose the Delete pane. You will not be prompted for confirmation. The version will be deleted immediately. Versions that are deleted cannot be recovered.



The screenshot shows the Cascade Advanced pane for the page `/cascade_training/contributor-training/example`. The pane displays a table of versions with columns for Path, Last Modified On, Last Modified By, and Comments. The current version is marked with a green checkmark.

Path	Last Modified On	Last Modified By	Comments
<input checked="" type="checkbox"/> cascade_training/contributor-training/example	Feb 10, 2010 10:16 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/example	Feb 10, 2010 10:15 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/example	Feb 10, 2010 10:15 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/example	Feb 10, 2010 9:55 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/example	Feb 10, 2010 9:51 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/example	Feb 10, 2010 9:50 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/example	Feb 10, 2010 9:49 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/example	Feb 10, 2010 9:43 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/sample	Feb 10, 2010 9:41 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/sample	Feb 10, 2010 9:38 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/sample	Feb 10, 2010 9:37 AM	terriv	
<input type="checkbox"/> cascade_training/contributor-training/sample	Feb 9, 2010 5:11 PM	terriv	Bulk change operation run by 'terriv'
<input type="checkbox"/> cascade_training/contributor_training/sample	Feb 6, 2009 1:55 PM	ows_trainer	

Select: All | None | With Selected: | Displaying 1-13 of 13

Additional Page Elements

Inserting Images, Links and Tables

Cascade makes it easy to add elements to your Web pages that enhance them visually and functionally. With the click of an icon on the WYSIWYG toolbar you can insert hyperlinks, anchors, images and tables.

Hannon Hill provides step-by-step instructions for adding these elements.

Inserting Images:

<http://www.hannonhill.com/kb/intros/business/insert-image.html>

Inserting Links:

<http://www.hannonhill.com/kb/intros/business/insert-hyperlink.html>

Inserting Tables:

<http://www.hannonhill.com/kb/WYSIWYG/-inserting-a-table-in-the-wysiwyg>

Other useful tips:

Reference Asset:

Allows a single asset to appear to exist in multiple locations in Cascade.

<http://www.hannonhill.com/kb/Reference/>

Import Zip Archive:

Allows for multiple files (images, document) to be uploaded at a single time instead of individually.

<http://www.hannonhill.com/kb/Zip-Archive/index.html>

Drag and Drop to Change the Order of the Assets in Your Left Navigation:

Allows custom ordering of left navigation. Does not change how assets are displayed in the asset tree, only how they are displayed in the left navigation.

<http://www.hannonhill.com/kb/Drag-and-Drop-Folder-Reordering/>

Upload a File During Insert/Edit Process:

Uploads a file that does not yet exist in Cascade at the time you are inserting/editing it.

<http://owsforum-web.clemson.edu/viewtopic.php?f=8&t=18>

Insert/edit a Link to an E-mail Address:

Creates a mailto: link

<http://owsforum-web.clemson.edu/viewtopic.php?f=8&t=6>

File Overwrite:

Allows content of a file asset to be replaced with the content of another file that is selected during the file edit process.

<http://www.hannonhill.com/kb/File-Override/index.html>

Versions:

Cascade Server automatically saves a version of an asset every time changes are submitted. These versions can be viewed or activated as needed.

<http://www.hannonhill.com/kb/Version/index.html>

Clemson 2009 Brand Guidelines:

<http://www.clemson.edu/campus-life/campus-services/creative-services/visual-guide/>

Clemson 2009 Brand Web Style Guidelines:

<http://www.clemson.edu/style-guide/>

Web Services blog:

<http://blogs.clemson.edu/ows/>