



CASCADE CMS

The image shows a screenshot of the Cascade CMS dashboard. The dashboard includes a navigation bar with 'My Content', 'Search', and user profile options. The main content area is divided into several sections: 'Welcome back CMS Basics Trainee' with a notification badge showing '6', 'My Content' with sub-sections like 'Recent', 'Shared Content', 'Drafts', 'Workflow', and 'Links', and 'Notifications' with a list of recent system events. A 'My Sites' section is also visible. A 'Login to your Website' modal is overlaid on the dashboard, featuring input fields for 'Username' and 'Password', a 'Remember me' checkbox, and a 'Login' button. At the bottom of the modal, the copyright information reads: '© 2017 Hannon Hill Corporation - v8.3.0 University of Houston'.

A CMS Basics Reference – For University of Houston Websites

Cascade CMS version 8
A CMS Basics Training Reference – University of Houston

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Online location of guide to Cascade version 7 vs. version 8:
<http://www.uh.edu/infotech/services/web-services/cms/cms-how-tos/where-did-they-hide-it/>

Other Resources Online

Infotech Web Services – Cascade CMS information, misc how to's;
<http://www.uh.edu/infotech/services/web-services/cms/cms-how-tos/>
Cascade training and access: <http://www.uh.edu/infotech/services/web-services/cms/>

UH Web Marketing – Cascade CMS guides to various page layouts (Home, Landing, Modular); Bootstrap & UH websites; Google analytics information; UH Web Community; UH Brand, best practices, policies, Marketing forms, writing style guide;
<http://www.uh.edu/marketing/web/cms/>

Introduction

What is the CMS?

The CMS, or the UH Website's Content Management System, is a browser-accessible, web-based application 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 CMS. For more information about Hannon Hill and Cascade, visit their online *knowledge bases* at: <https://www.hannonhill.com/cascadecms/8/kb/> or <http://www.hannonhill.com/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: Windows, Mac, Linux, and Solaris. It is supported by most major up-to-date browsers, including Firefox, Chrome, Internet Explorer, and Safari.

Getting Started

For the UH Website CMS Basics training you will be working within a training site. This is an area 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.

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The CMS 'Home' or 'Dashboard' View

After logging in you should see a screen similar to the one above, also known as your "Home" or "Dashboard" view. The Dashboard view is highly configurable, and gives you a number of options for navigating around your site[s] and getting information about your site materials. Please note that some widgets must first be pointed towards your specific Site[s] before they can generate reports for you.

General Notes About Working in the Cascade CMS

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. If when you are working within your site something is not working for you as expected, please contact either the UIT Web Technologies group or Web Marketing for assistance.

Remember to Sign Out

When you are done editing, go to your User button and select **Sign Out**.

Settings

Your Settings may affect your user experience. In particular, new with version 8 of Cascade server, is the User's ability to decide whether to view information about their materials by **System Name** or by **Title/Display Name**.*

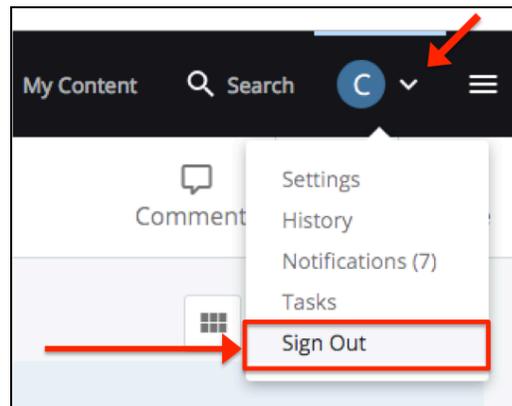
System Name view was the default for all versions of Cascade before v.8.

To toggle this view, go to Settings: Appearance of Asset Links and uncheck or re-check the "Show asset's Title or Display Name if available" checkbox.

Discovering more Asset information: Regardless of what asset view you have selected, if you want more information about an icon or an asset, roll over it with your cursor and hover for a moment (without clicking*), and you should see information displayed such as the name of an icon or the full system path of page, folder, or file.

*Clicking on an asset name in a listing will take you to the asset itself.

Notifications and Tasks: Cascade v.8 has a number of new features, such as the ability to send a message through the CMS to an asset's Content Owner via Notifications (formerly "Messages"). Also new with V.8 is the ability to set up and/or assign Tasks.

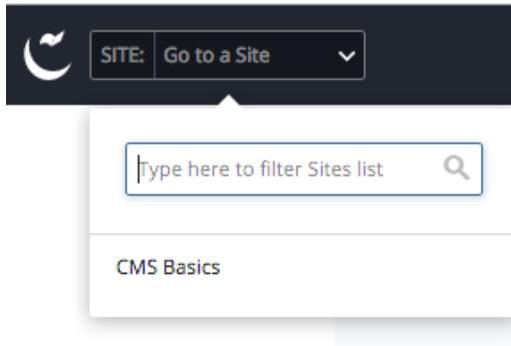


Finding Your Area's Site and Content

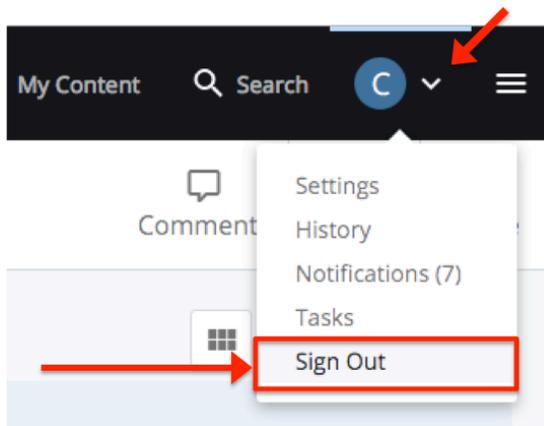
Where is it in the CMS?

You are considered to be “in your site” once you arrive at the Site Content view, where you will find the Asset Tree and the tools to edit your site materials. There are a number of options available to get you there.

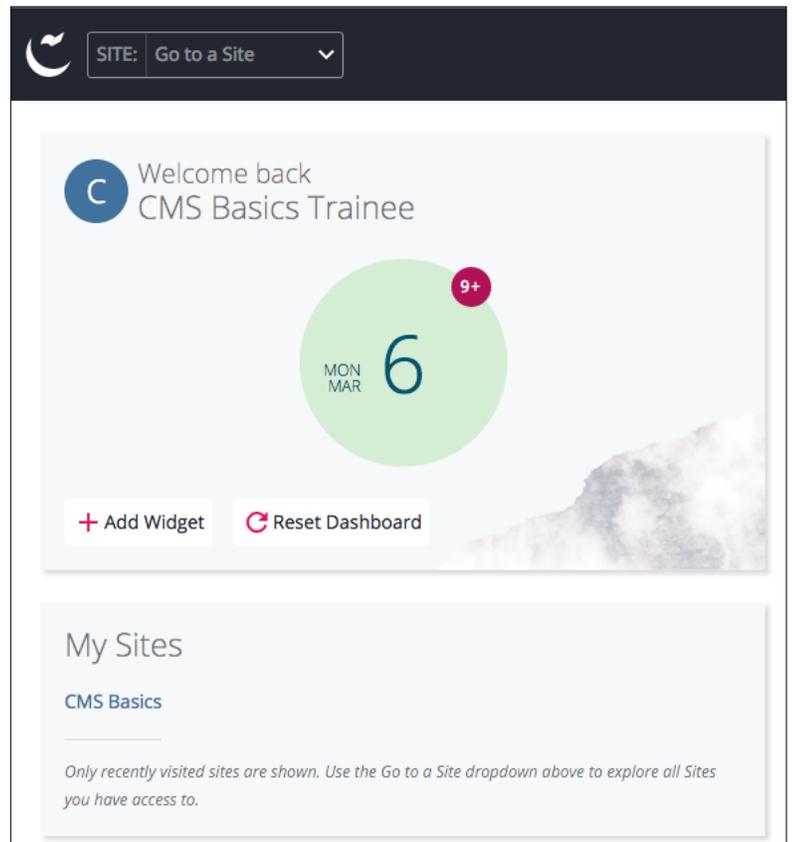
The Cascade Menu Bar– the black bar along the top of the interface – is always present, and has some permanent residents of its own to help you navigate around, such as The **SITE: Go to a Site** selector.



To return to your Home/Dashboard view at any time, click on the Cascade logo in the upper left corner of the Cascade Menu Bar.



Log out at any time by going to your User area and selecting **Sign Out**



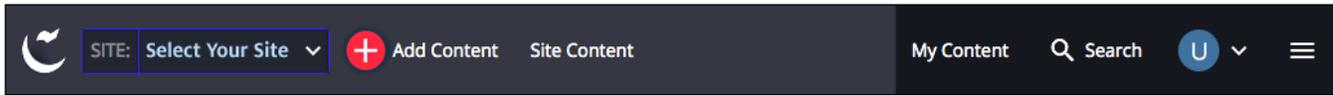
Additionally, the Dashboard (or “Home”) view has a number of Widgets designed to offer you options for navigating to your site(s) – or for discovering more information about the materials you have access to – such as the My Sites widget or the My Content widget.

Roll over a widget with your cursor to see options to configure or delete it. Add widgets back or create multiples of widgets with the **Add Widget** button in your **Welcome** widget. Reset Dashboard returns the Dashboard to its default configurations.

The My Content **area**, accessed through the button on the right-hand side of the Cascade Menu Bar, can also offer ways to enter your Site Content area(s) – e.g. through linked assets in the Recent list.

Please be aware that the Dashboard and the My Content areas are considered to exist in an area “outside” of any specific site, so when visiting them you will need to “return” to your site in some manner to continue editing. Once you are within a Site you will see slightly different Cascade Menu bar options – illustrated, following.

The Cascade Menu Bar



Various options are available here, depending on from where, or how, you may be viewing it at any given time.

Persistent options: The **SITE: Selector** will allow you to enter a site or move between sites. Clicking the **Cascade logo** will return you to your Home /Dashboard view. **Search**, **User**, and **Stack** should also be persistent residents of the Cascade Menu Bar, although at narrow window widths some items may move under **Stack***.

Other options: From within your Site you should see the following selection of options:

Add Content – will allow you to create new folders, pages, blocks, etc. and to upload files into the CMS.

Site Content – will display/refresh your selected Site's Asset Tree and Information/Editing/Action options.

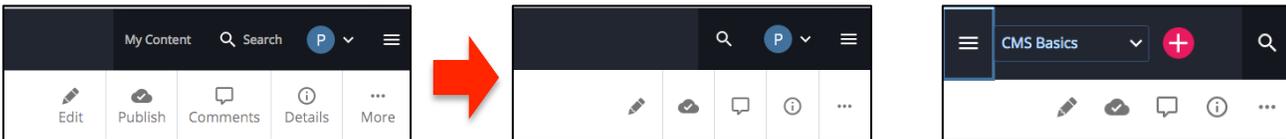
My Content – takes you to various reports about the site materials you have access to, such as: *Recent, Owned Content, Drafts, Workflows, Locked Assets, and Tasks Assigned to Me.*

Search – allows you to search your Site(s) for asset names, text, etc. or employ advanced search options.

User Options – allows you to change your user *Settings* (preferences), see your *History* of visited assets, view your *Notifications* and messages within the CMS, review your *Tasks*, and to **Sign Out** of the CMS.

Stacked/Collapsed Menu – gives you access to the *Publish Queue, Reports, and Tasks* as well as links to the Hannon Hill Knowledge Base pages. *At narrower browser window widths, **Site Content** and **My Content** options also appear here. At narrowest widths, **Dashboard** and **User** may also move to the **Stack** menu.

Please note that the CMS interface is responsive to the width and display resolution of the browser window through which you have logged into Cascade. So, for example, you may find that at narrower widths your "My Content" and/or "Site Content" links move from being separate buttons in the black Cascade Menu Bar to being options under the Stack Menu; or, you may see the descriptive labels for the action buttons [Edit, Publish, Comments, Details, More] disappear, leaving only the icons [e.g. pencil, Cloud-checkmark, cartoon speech bubble, circled letter "i", 3 horizontal dots], etc.

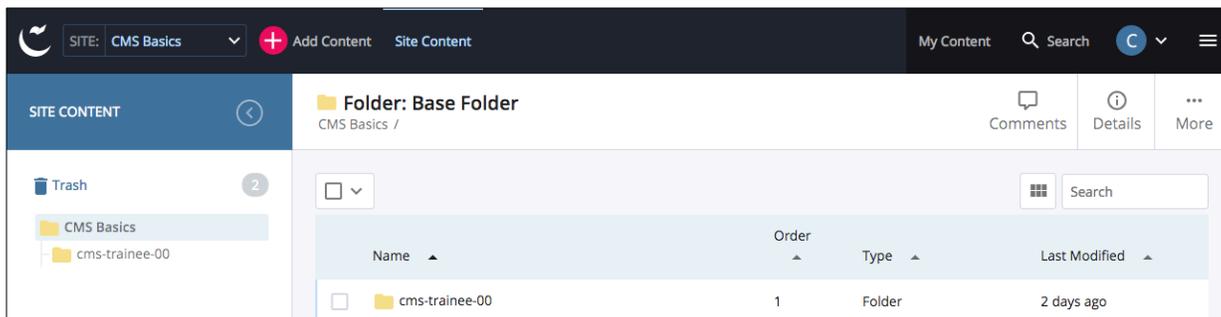


Please also bear in mind that the CMS is largely a permissions-based application. For example, a user without Publishing privileges would not see the Publish (or Unpublish) options in their interface at all.

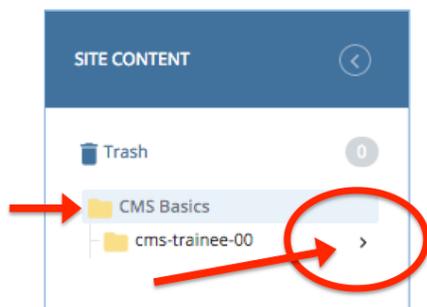
Where are the Folders, Pages, and Files themselves?

Once you have selected your Site from the Site Selector, the CMS will take you into your *Site Content* . . .

A Site Content View:



Viewing Your Site Materials – Folders, Pages, and Files – The Asset Tree



see also:
Important editing tips, p.7

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.

This is represented visually through **the Asset Tree**.

The Asset Tree appears as a left-hand side panel in the Site Content view. To expand the asset tree, click on any Folder shown.

To see the Information/Editing/Actions panel for a **Folder** in the asset tree, **click on the angle-bracket/arrow** to the right of the folder, which should appear as your cursor rolls over it.

The right-hand panel offers information about whatever asset is actually selected as the active asset (identified in the top white bar), as well as Editing and other User action options.

Note: To allow more room for the Information and Actions panel, the Site Content Asset Tree Panel can be collapsed (and again expanded) by clicking on the circled angle-bracket arrow in the panel header.

Name	Order	Type	Last Modified
<input type="checkbox"/> _css	19	Folder	2 years ago
<input type="checkbox"/> _documents	4	Folder	3 years ago
<input type="checkbox"/> _images	5	Folder	2 years ago
<input type="checkbox"/> _sample-assets	3	Folder	a year ago
<input type="checkbox"/> _spiffs	2	Folder	3 years ago
<input type="checkbox"/> _ssi	1	Folder	8 months ago
<input type="checkbox"/> empty-page-trial-021716	6	Folder	10 months ago
<input type="checkbox"/> feedback	18	Folder	2 years ago
<input type="checkbox"/> home-spiff-special-interest-features	17	Folder	2 years ago

Above: expanded Asset Tree under the Site Content Panel, with a Home Folder Information/Action options panel displaying to the right (with Folder Contents List in the preview area).

For further information about an Asset's Order number and how it affects your site, please see p.9, p.13, p.38.

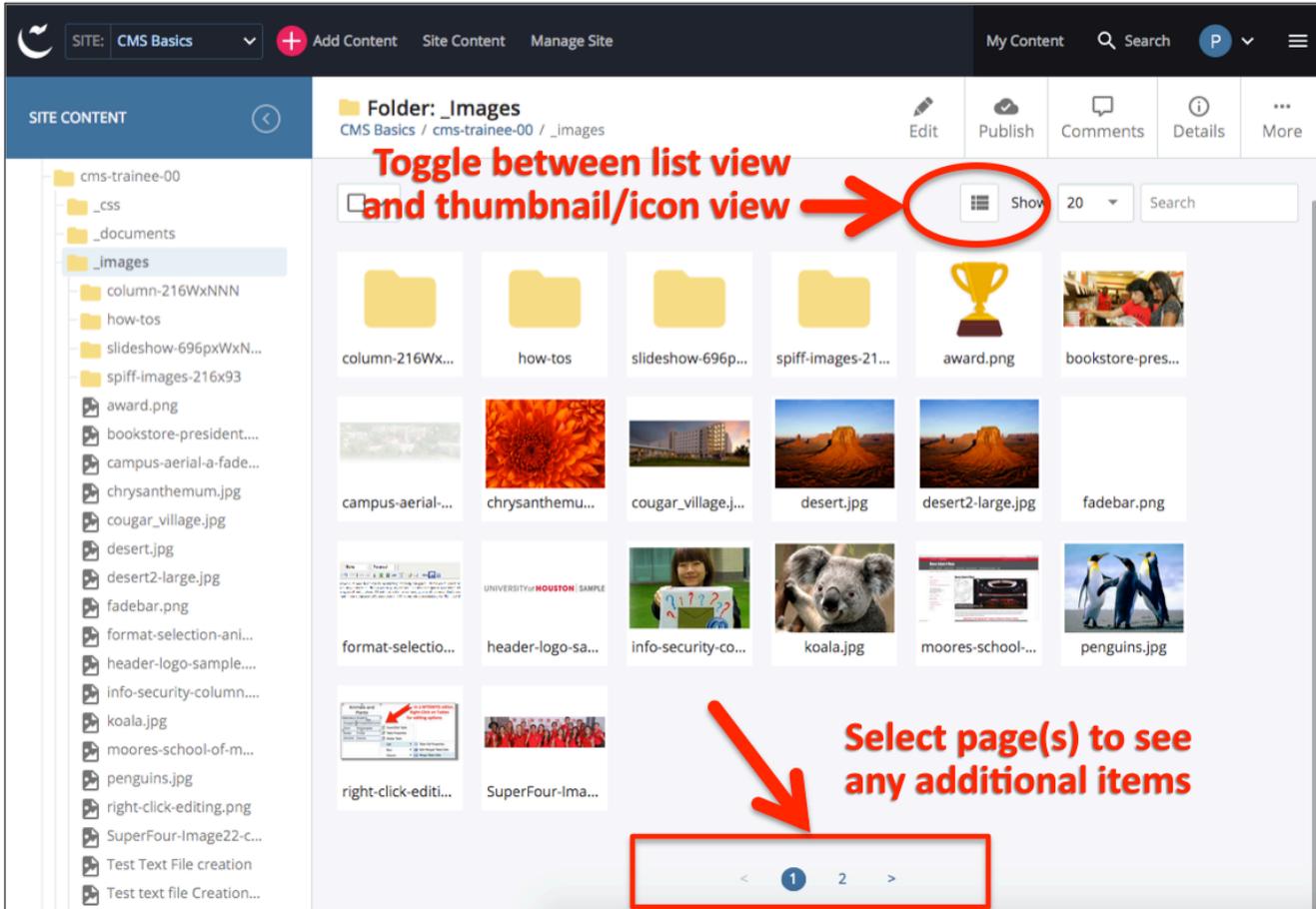
Remember the "Appearance of Asset Links" Setting: System Name View was the default for all versions of Cascade before version 8. Cascade CMS now has the capacity to display asset lists (including the Asset Tree itself) by assets' Titles instead of by System Names. To toggle this view, go to **User >> Settings >> Appearance of Asset Links** and **uncheck/check the "Show asset's Title or Display Name if available"** checkbox.

Roll-over help text: Regardless of which view you are using, you can always find out more information about an interface icon or an asset's location by hovering over it with your cursor for a moment, to bring up the help text and/or show the system path for the asset. *(see also notes following, on p.8)*

Viewing Your Site Materials – Folders, Pages, and Files – The Asset Tree (cont.)

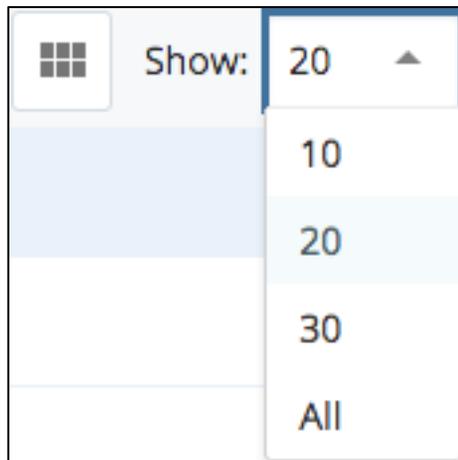
Thumbnail/Icon View for Folder Contents Lists

The contents of a folder can also be viewed in Thumbnail/Icon View. The Thumbnail view can make it easier to select a graphic. Click the **Thumbnail View icon** to toggle view between **Thumbnail/Icon** view and **List** view.



For either view, if there are more items in the folder than the display number you had selected, then you may page through to see any additional results; and/or select a different number of items to be displayed.

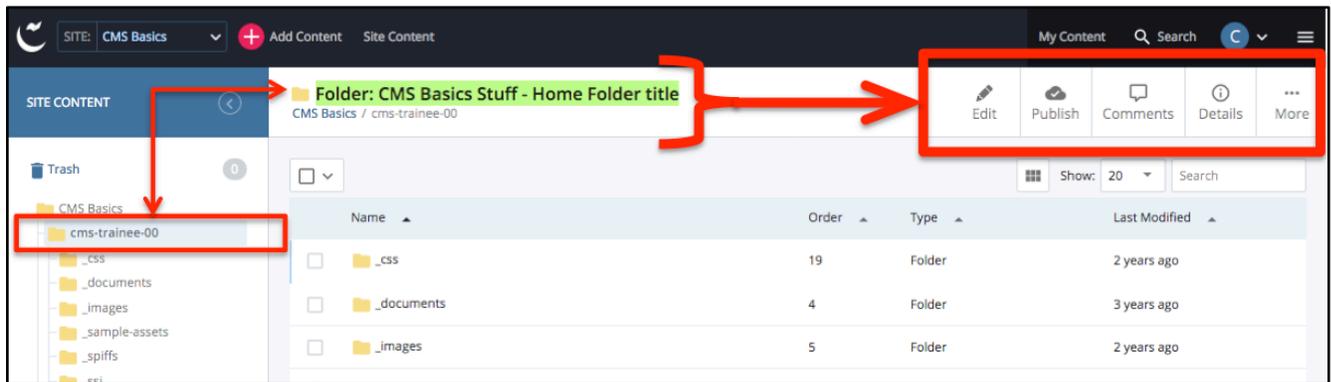
You may elect to display up to: **10, 20, 30,** or **All** items within any given folder.



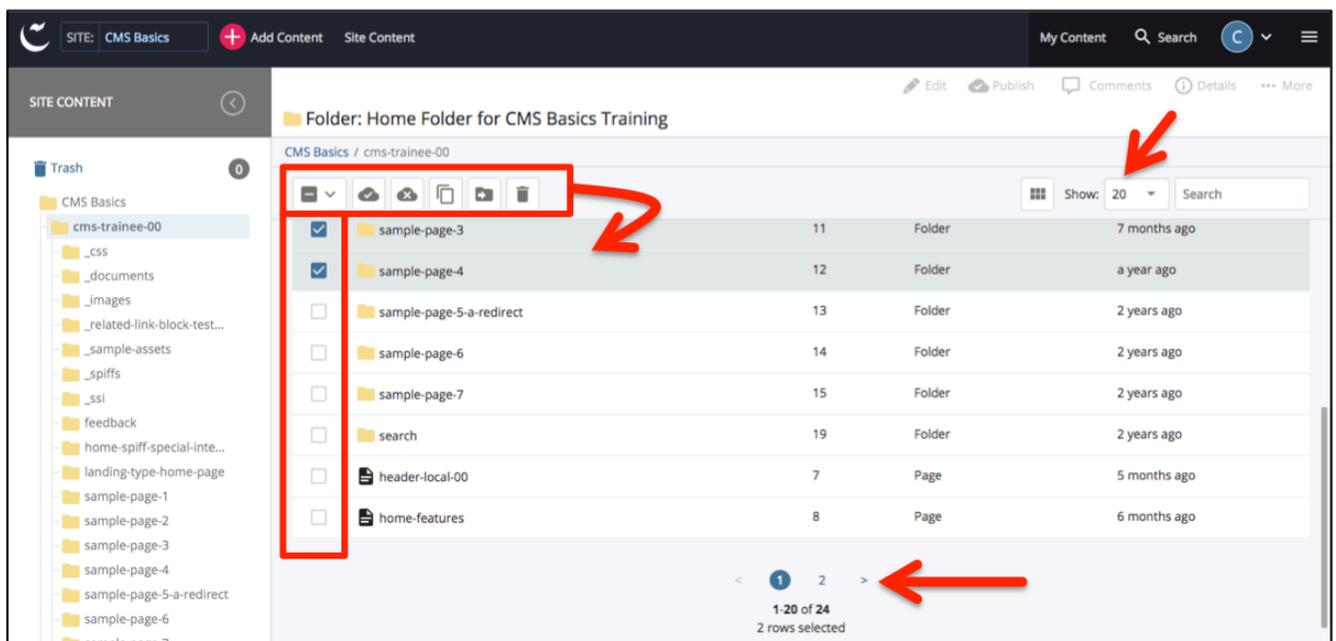
Important Editing Tips

A number of editing tools within Cascade CMS must be selected in a specific way for them to work correctly.

For Example, Please Note: Whichever Asset is selected in the Asset Tree and which is identified at the top of the Information Panel by *name* and by *system-name-path* is the Asset which the Edit Bar buttons actions will relate to: *Edit, Publish, Comments, Details, More*. **Actions** applied to a Folder apply to its contents as well.



In contrast: Assets selected using the checkboxes from a **Folder Contents List** can only be affected by the Editing tools which appear at the top of the **list** itself: *Select/Deselect All, Publish, Unpublish, Copy, Move, Delete*.



In fact, you may see the main buttons become inactive (greyed out) when one or more checkbox is checked. Additionally, if the Folder Contents List is paginated, the multi-select editing options will only affect the list displayed at the time. You may need to scroll down to see if pagination exists.

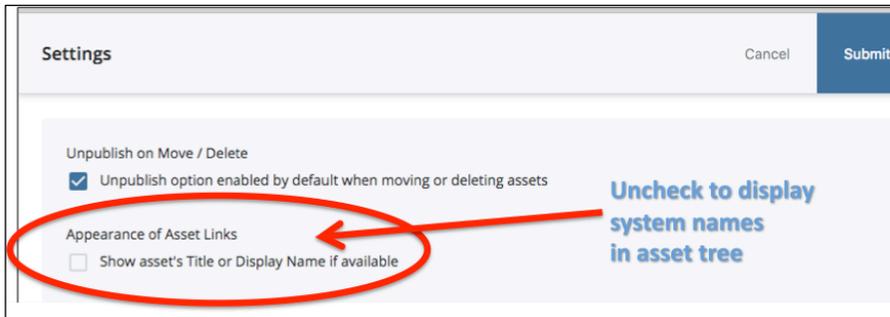
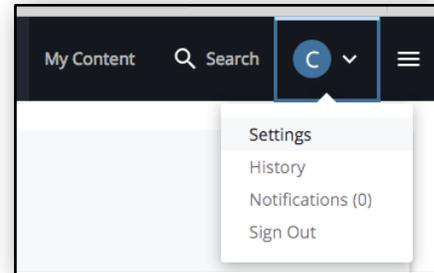
Please proceed carefully before applying the same action to multiple or complex assets, as these multi-select actions may not have the same granularity of settings as the editing options available on an asset-by-asset basis.

Please also remember that the CMS is a "permissions" based application. This means that which assets, editing/action options, and information you see may depend on your User Permissions. Users without Publishing permissions, for example, would not see the **Publish** (or Un-Publish) options anywhere in their interface.

Viewing Your Site Materials – 'Appearance of Asset Links' User Setting

In Cascade v.7.14 (the version in use before the upgrade to v.8), and as in all versions previous to v.8, the default was for users to see System Names in the Asset Tree. *(see more about System Names, p.20, p.39, and throughout)*

Users can now choose to view either Assets' *Titles/Display Names* throughout the CMS interface or the Assets' *System Names*. To toggle this setting, **go to your User menu button and select Settings**, then check or uncheck the "Appearance of Asset Links" item. When un-checked, the CMS will show Assets' *System Names* throughout the CMS interface. When checked, the CMS will display assets' *Titles* or *Display Names*.



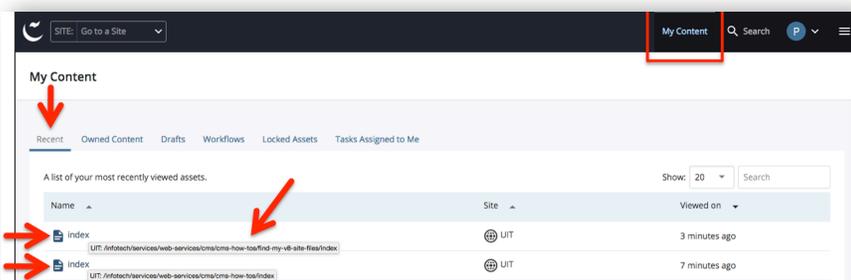
An Asset's System Name, Display Name, and Title are each critical to how your materials are dynamically managed inside the CMS, how the information ultimately looks on the final web page, and how the materials publish out to the server. Each User can decide which view they wish to use in their interface, and can decide to switch back to the alternate view whenever it may be useful to them.

System Names, Asset Titles, and Display Names each follow different, and important, naming rules. Please see also information about each one throughout this handout.

The order in which assets are displayed in the asset tree is always by asset type first and then by name.

Within any given Folder, any contained Folder assets will be ordered above all page, file, and block assets regardless of the folders' names; then, for all other assets, names starting with a number fall above those starting with an underscore, and underscores fall above letters. Bear in mind, with the asset naming view toggle, the same asset may thereby fall in a different visual order on the asset tree depending on how the user looking at it has his or her "Appearance of Asset Links" toggle selected in their Settings. On the following page is one example of how the visual apparent order of an asset tree might change depending on which Setting the User chooses to use.

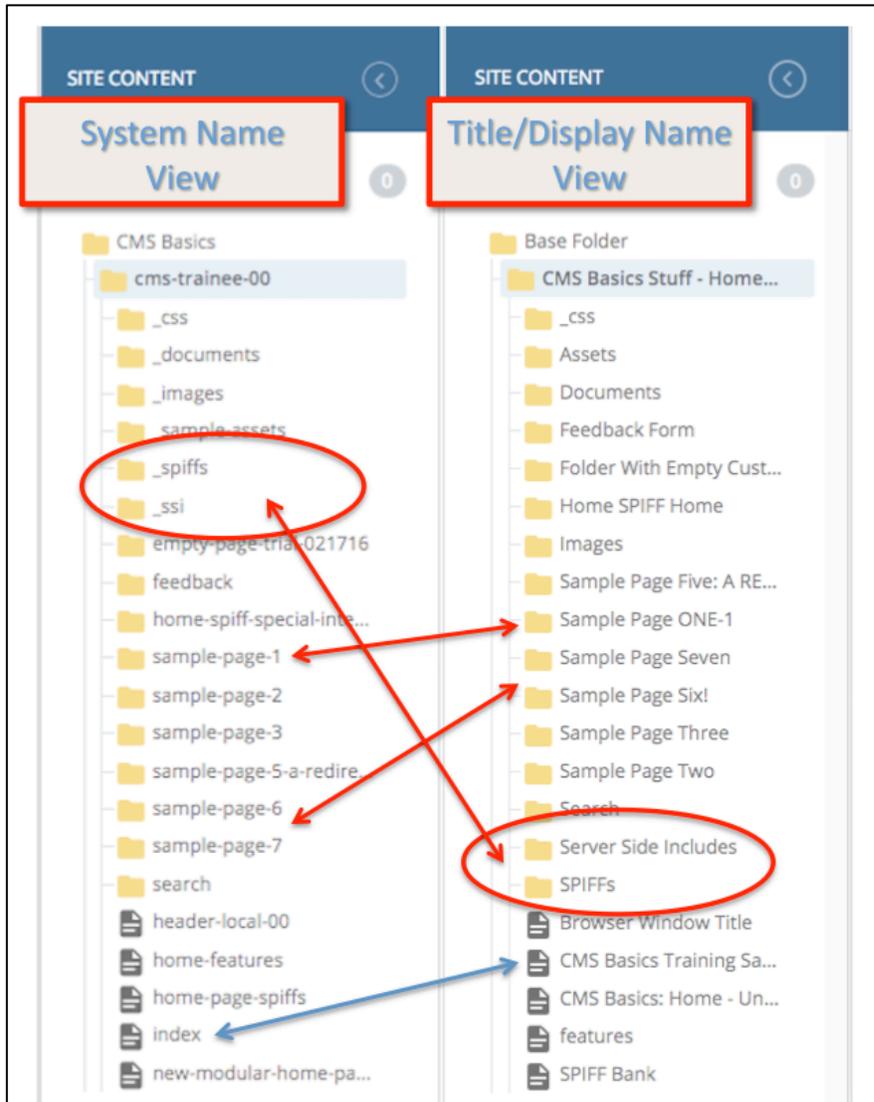
Roll-over help text: Regardless of which view you are using, you can always find out more information about an interface icon or an asset's location by hovering over it with your cursor for a moment, to either bring up the help text or show an asset's system path.



In the example here, using System Name view, two pages both show their identical system names*. Additional identifying information – the system path – appears on hover.

Assets can also be further distinguished through their icons – Page: File: Block:

*** Warning:** Do not use Rename to change a page's default System Name of "index" unless you have a specific purpose for doing so, as some of the file management processes inside the CMS will break, such as the left nav menu links.



Your Asset Tree can look very different to you, depending on which View you elect to use.

However, remember that this does *not* mean your basic underlying site structure has changed!

The same materials are still physically inside the same folders as they were before – you're just seeing them by different names; just as a house might be known alternately by either its street address or as the home of the family living there:

- e.g. *1234 Fifth Street*
vs. *The Henderson's house.*

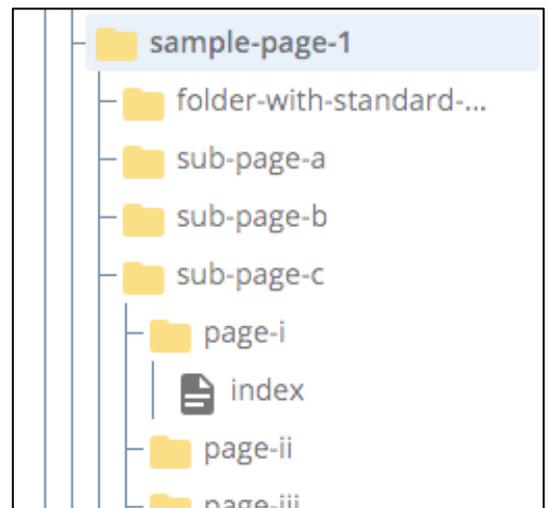
The parent-child relationships are the same – things are still "nested" the same way – and the Folders' order numbers and other settings have not changed – and so there is no effect from the Asset View toggle on a Left Navigation Menu or on a Breadcrumbs string, for example. Those types of things are always determined by a Folder's or Asset's settings and properties, and *not* by your User Settings.

Above, an example of a single Asset Tree viewed with different Appearance of Asset Links settings, illustrating how it can make the same assets appear to be in a different order in the same Asset Tree.

About Order Number

An asset's Order Number is assigned upon creation, relates only to its parent folder, and is based on the number of other items already existing within that same folder. The order number for a Folder will determine where in the left navigation menu for that section the enclosed page's listing will fall. Smallest number is closest to the top. Order number can be manually reassigned. See 'How To Change the Order' notes on p.13.

Note that the Asset Tree now has leader lines to help visually distinguish at what depth in the site an asset may reside, and to help tell which assets are parents, and which are peers, or children.



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 Cascade-bar’s Add Content 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, organizing 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 interior page in the UH website. This asset factory creates two assets at one time – 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: p.20, p.39, and throughout handout.

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

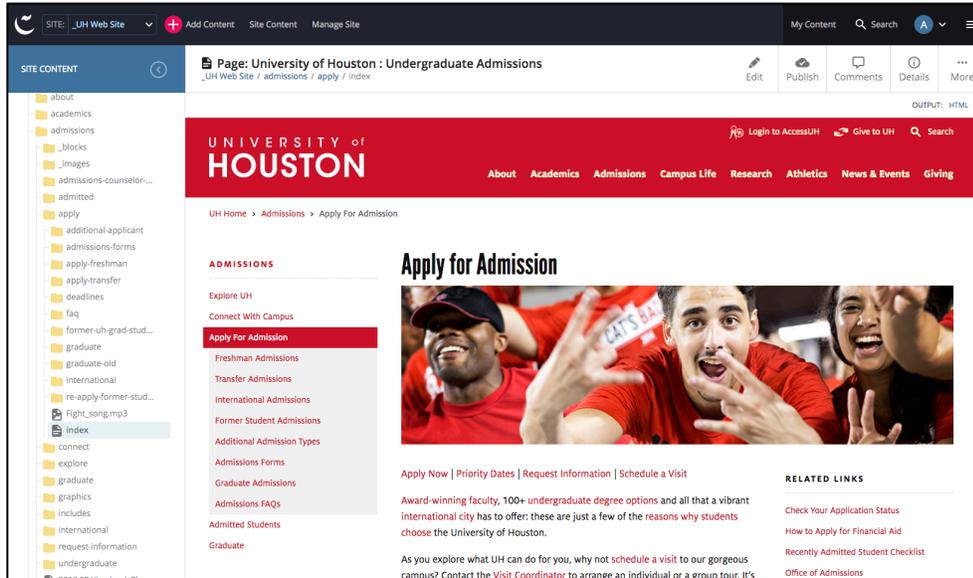
Files are usually supporting materials for your site (e.g. downloads or images) or may represent site resources which do not directly appear within Standard Content Page formats. File-type assets are materials introduced into the CMS via upload through the Add Content => File asset factory (which also accommodates and unpacks .zip Archives). **Please note** that File-asset **system names** need to retain a correct **file extension** (e.g. *.pdf, .jpg, .css, .js, etc.*).

Folder with Redirect – Physical Page →

This asset factory also creates two assets at one time – a *Redirect – Physical Page* at your specified location within your site, and the menu-eligible folder which holds it and which allows the Redirected page to be included in the local left navigation menu even though it is not an actual content page in that location. This arrangement can also allow you to include a page in your local left navigation menu which is not inside your own site at all. *Just tell the Redirect what internal or external (requires a URL) page to look for. The Redirect uses PHP scripting in order to initiate a server side redirected link.* These assets do not generate a WYSIWG preview of the target page within the CMS. When LIVE, selecting this menu item will send the site visitor to whichever page you designated when setting up the Redirect.

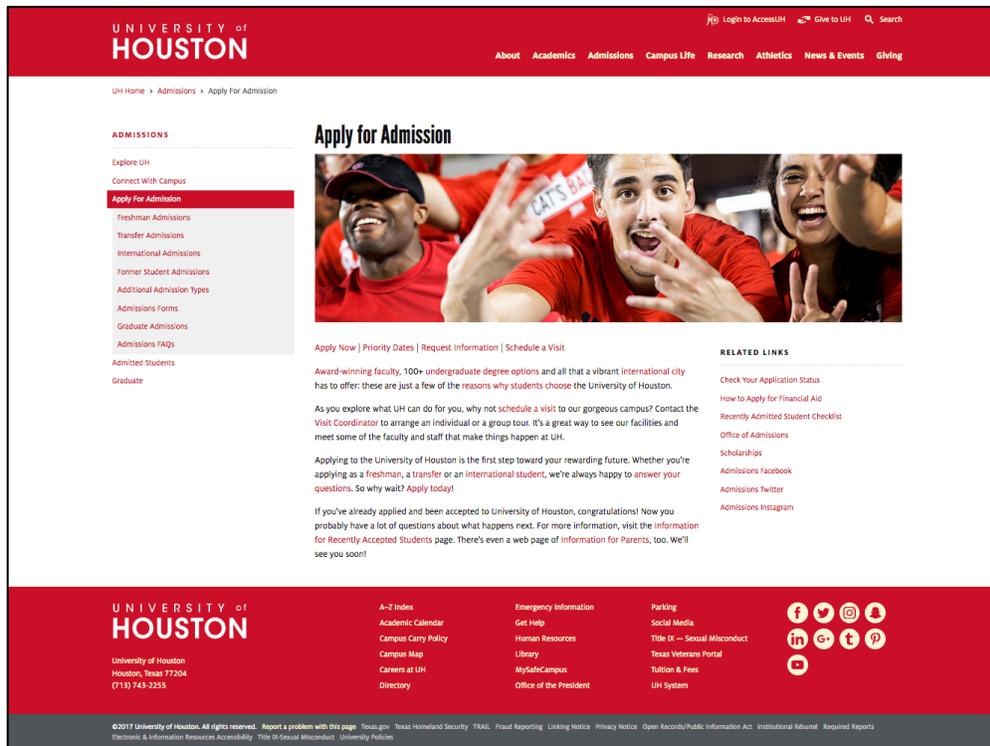
See also notes about other asset types, p.44: **Block** assets; **Reusable External Link** assets.

The CMS stores all the information needed to Publish out whole and entire web pages – including many pieces to which you will have no editing access (e.g. UH stylesheets, scripts, etc.) and even pieces you cannot see within the CMS (e.g. Browser window Title bar text).



CMS Page Preview within the right-hand information and actions panel.

However, the CMS will apply the appropriate hidden pieces to its Page Previews, so you will have a good idea of how the final page will look and how much of the functionality works before you publish the page.



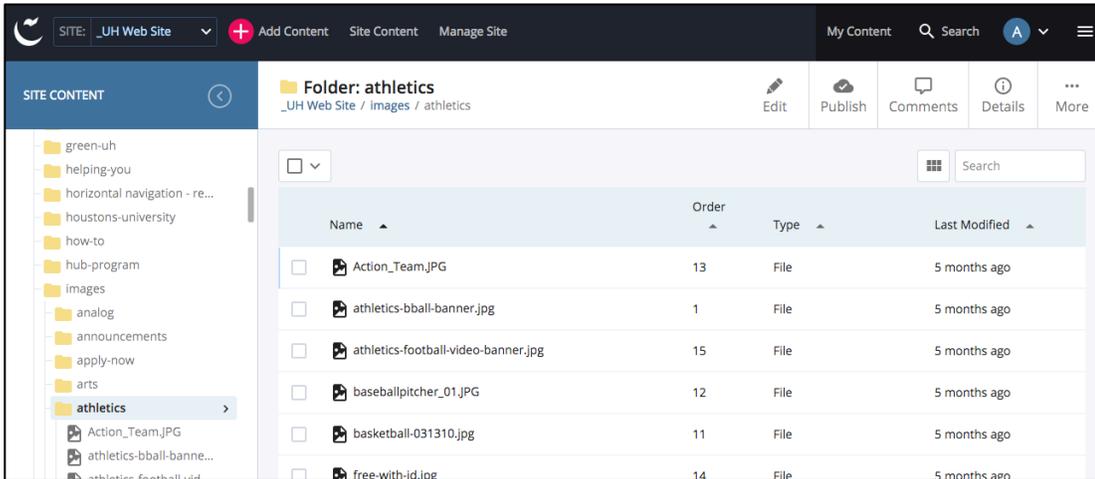
Live (or Staging) published page.

See more about Publishing on pp. 40-43, p.19, and elsewhere throughout this handout.

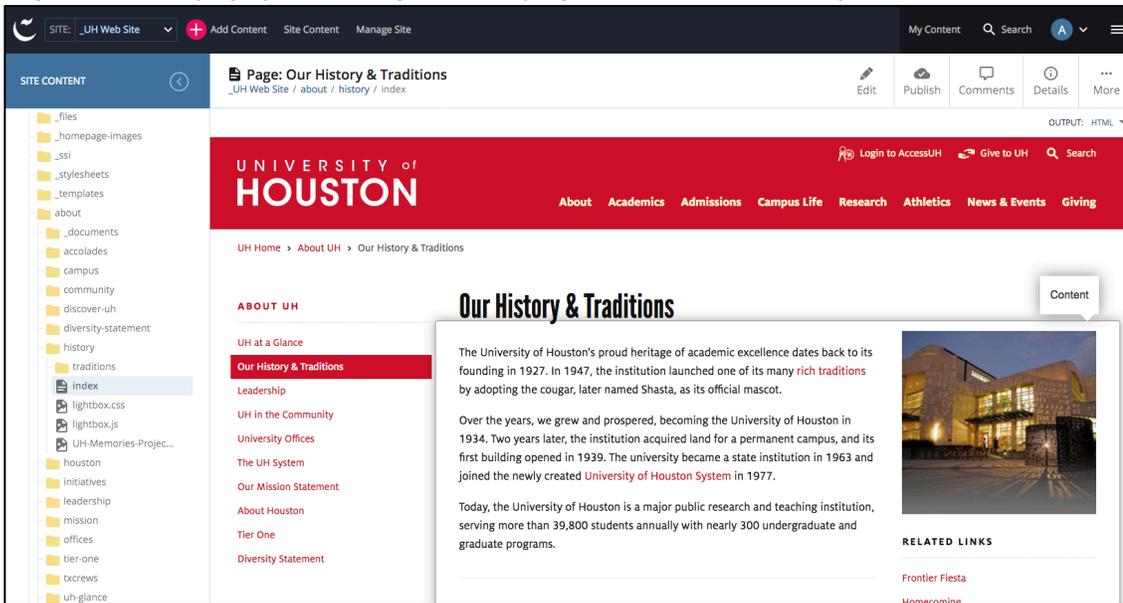
Asset Tree Panel vs. Preview Panel

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

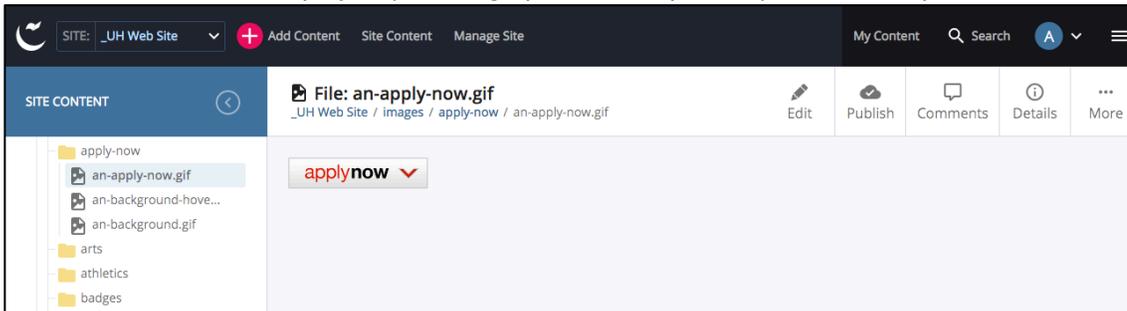
Folder selected – folder-contents list info and action options illustrated:



Page selected – page preview, region-identifying rollovers, and action options illustrated:



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



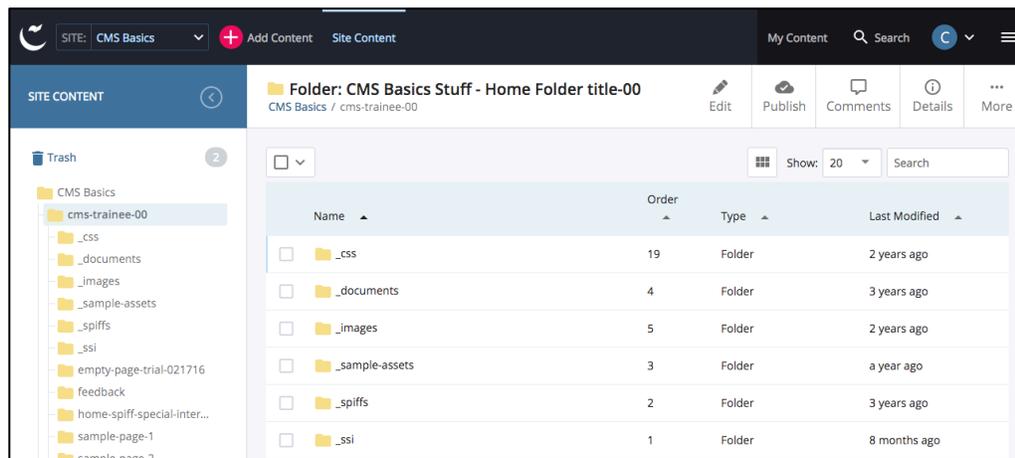
TIP: See also the **More Button** editing and action options for each asset type, p. 19.

Folder Information/Editing/Actions Panel

When you **select a Folder** in the Asset Tree view in the left side panel (*remember to click the angle-bracket arrow!*), you then see the information and action options for that folder displayed on the right hand side of the browser window. *See also, Important Editing Tips earlier in this handout.*

All information panels also show, in the top row, the selected asset's type, name, and relative position/path within the CMS and the information and action options available for the identified asset (e.g. the **Edit, Publish, Comments, Details, and More buttons** – giving users editing-access to the folder and its associated information) as well as a linked System Path directly below the name (giving users additional navigation options, as each parent-folder level links to its respective source). *In the example shown below, the type, name, and path are:*

Folder: CMS Basics Stuff – Home Folder title-00 CMS Basics / cms-trainee-00



Name	Order	Type	Last Modified
._css	19	Folder	2 years ago
._documents	4	Folder	3 years ago
._images	5	Folder	2 years ago
._sample-assets	3	Folder	a year ago
._spiffs	2	Folder	3 years ago
._ssi	1	Folder	8 months ago

Those assets contained directly within the folder will be displayed both under the folder's icon in the Asset Tree view on the left side, and in a right-side information/editing/action panel **Folder Contents List**. Items on both sides are linked, so you can use either panel to get to your materials.

From the right-hand panel on your screen you may **Edit** the selected folder, **Publish** it, or even **Move, Rename, Copy, Delete, and/or Unpublish** it (see items under the More tab). You may also post **Comments** to the Folder's Content Owner, or see **Details** about the Folder. Remember assets should always be Un-Published at some point when Deleting, Renaming, or Moving them - so be prepared for that. *(See more on publishing / unpublishing p.40–43 & throughout.)*

Additionally, the **Folder Contents List** view allows users to change the **Order** of any sub-folders. Why? Because the CMS builds the left-hand navigation menu from information associated with a page's Parent (containing) Folder, and **re-ordering page bearing sub-folders will directly affect the order of the on-page menu display**, allowing you, when desired, to override the original order (*new items are usually added as the last item in the menu*).

How To Change the Order: Click the **Order column** header/arrow to see the list in ascending or descending order. Then click and drag the row for the item you wish to re-order. The new numbering is assigned instantly when you drop the item into the desired position. **Reordering Folders is dynamic and automatic** – you will not have to “submit” this type of change. **You will have to remember: Publish from the Parent to Synchronize Your Site*.**

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. 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). 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). In this case, you would need to **Republish from the Parent Folder of the Folders/Pages which changed their order**, because **every page under their Parent Folder would "see" the change (i.e. include a rendered left nav menu which changed)**. Alternately, in the case of a changed File (e.g. system-name change, or content change), you could go to the File itself, select **Relationships** from the **More button**, and elect to **Publish all Relationships to Synchronize your site**.*

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

Folder – Editing Options and Settings

The Folder Editing panel consists of two dialogs: Metadata and Properties.



The most critical settings in the **Metadata dialog** have to do with:

- 1) the **Folder-type asset's Title**;
- 2) whether or not the folder contains a page which should be **Displayed in the Left Nav Menu** (and the breadcrumb);
- 3) **and if so**, whether it will take on the additional status of serving as a **Section Header** ("resets" the left nav "home" page);
- 4) **and if so**, whether the Header for this section will use a **Custom Header**.

 This is a screenshot of the Metadata dialog. At the top, there is a checkbox labeled 'Check Spelling'. Below that is a text input field for 'Title *' containing the text 'Cascade V.8 Images'. Underneath are two sections: 'Display in Menu?' with a 'Yes' checkbox, and 'Display as Header?' with 'Yes' and 'Custom Header' checkboxes.

NOTE: Folders with no viewable index page should be left out of the Menu.

Folders with pages which are under development but which are not yet ready to be added into the **Left Nav Menu** can also be set to **not Display in Menu**. In this instance, care should also be taken with whether or not the folder/page is Publishable, as well. Be sure to choose the settings which are appropriate to your purpose.

Other Metadata Settings

Display Name can potentially be used as an asset's name in the Asset Tree and other system reports. *Display Name* can also provide link text if an asset can be used as an internal link in a **Related Links Set** or **Custom Menu bar** – however, Folders cannot. Search engine optimization for your page will be helped by including *Key Words* and a *Description* offering details about the purpose and content of the page.

Other settings, such as **Start** and **End** dates, and **Expiration** folder can be important in managing time-sensitive content; setting a **Review** date can help edits get made in a timely manner, by including the asset in a list for your **Content to Review Dashboard Widget**.

 This is a screenshot of the Properties dialog. It contains several text input fields: 'Display Name', 'Summary', 'Teaser', 'Keywords', 'Description', and 'Author'. Below these are date pickers for 'Start Date', 'End Date', and 'Review Date', each with a placeholder 'mm-dd-yyyy hh:mm a'. At the bottom, there is an 'Expiration Folder' section with a 'Choose Folder' button. A small note under 'Start Date' reads: 'The asset will be published at this date if it is enabled for publishing.'

Other Metadata Settings

The Properties dialog

In this dialog you can set the Folder's **indexability** and/or **publishability**. Upon creation all Folders, Pages, and Files are set to be both indexable and publishable. Either setting can be adjusted on an asset by asset basis. Disabling either or both of these settings at the Folder level will override the respective functionality for child items inside the Folder. *See also: p.24 notes.*

The **“indexing”** setting represents a dynamic function inside the CMS, of assets sharing their **Metadata** with the Content Management System.

If a Folder contains a page which you want to appear in the Left Nav Menu, the Folder will need to be **‘included when indexing’**. If this setting is not checked, then the item cannot appear in the menu regardless of the requested setting in the **Metadata dialog** (*previous page*).

In fact, with “indexing” *inactive*, many dynamic processes such as the building of the Left Hand Nav Menu and Breadcrumbs can be impaired, and cause problems. However, “indexing” in and of itself is not typically significant for a Folder *without* a child page, and so it can usually be left checked without harm as long as the Folder in question is also set to *not* “Display in menu” (*previous page*).

The **“Include when publishing”** setting enables the CMS Publisher; i.e. to be able to write the indicated item as a static file to a server location (“destination”) upon request. Unchecking this setting for an asset means the asset can’t be Published; i.e., the next time any area of the site publishes, any individual items with this setting unchecked will be skipped in the publishing process. For Folders set to not-publish, no child-materials will Publish either.

Most assets in your site will need to be published at some point, so you probably only want to switch Publishing off if you wish to protect an asset from being written to the server – e.g. when you do not wish it to replace an existing item already published to the server, or if you are developing materials which may not yet be ready to be published, and so forth. Managing Publishing (and Unpublishing) may also involve managing which Publishing Destinations you select. *See more information about Publishing and Unpublishing p.40–43 and throughout this handout.*

Metadata Information Categories – Metadata Sets

The CMS stores associated information for each and every asset in its system based on a standardized set of categories. This set of categories is also known as a **Metadata Set**. Every category of **Metadata information** for every asset is retained in the CMS database whether it is being dynamically used by the system or not. While Users will not typically have permission to alter an asset’s specific *Metadata Set system component*, they will typically be able to control whatever information is held in each category for *every asset they have permission to edit*.

The basic, editable Metadata for every asset includes its: **Display Name, Title, Description, Keywords, Summary, Teaser, Author, Start Date, End Date, Expiration Folder, and Review Date**. For some assets, Metadata Sets may also include additional custom categories which have been defined by CMS administrators.

Some of the Metadata is important, even critical, to how the CMS manages dynamic functions. Some examples: **Folder Title metadata** feeds the automated navigation building (think: Left Nav Menu and Breadcrumbs). **Page Display Name metadata** provides headlines. **Description metadata** supports SEO.

Users are expected to edit Metadata appropriately for all the materials throughout their site/area. It is especially important for Folder, Page, and File assets. Metadata settings are discussed in more detail along with the information for each asset type, throughout this handout.

Please also note: when the CMS Publisher function is constructing your final webpage[s], it does use some of the metadata information to inform the webpage’s HTML tags. For example, a Page Asset’s “Title” field text becomes the HTML Title tag, which displays as the page’s browser window title; and the Description field text becomes a “meta” tag which search engines can use to judge content relevance.

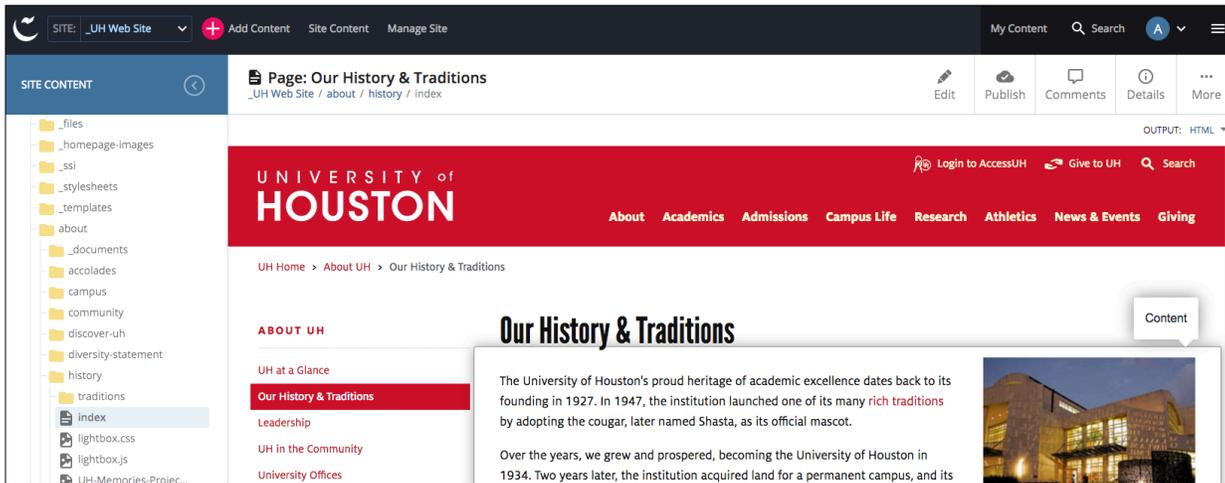
Page Preview & Information/Editing/Actions Panel

When you select a **Page** in the Asset Tree in the left side panel, you then see the Page's preview as well as the information and action options for that page displayed on the right hand side of the browser window

All information panels also show, in the top row, the selected asset's type, name, and relative position/path within the CMS and the information and action options available for the identified page (e.g. the **Edit, Publish, Comments, Details, and More buttons** – giving users editing-access to the page and its associated information). The path below the asset name will also offer additional options for navigating around the CMS, as each ancestor folder in the path is linked, and when clicked will take you to that folder.

In the example shown below, the type, name, and path are:

 **Page: Our History & Traditions**
 _UH Web Site / about / history / index



This **View / Preview** 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 (e.g. effects of custom scripts). Those types of things may need to be reviewed by examining the page as published to Staging*.

From the **right-hand information panel**, the options available to you are displayed as flat buttons/icons in the row under the Cascade Menu Bar. Depending on your user permissions, you may **Edit** the selected Page, **Publish** it, or even **Move, Rename, Copy, Re-Version, Delete, and/or Unpublish** it (see items under the More tab). You may also post **Comments** to the Asset's other editors (append **@cms-username** to Notify each eligible CMS User you want to see the message), or see **Details** about the Asset (current metadata, creator, recent activity, Content Type etc.). Please remember: assets should also be UnPublished at some point when Deleting, Renaming, or Moving them - so be prepared for that. (**See more publishing and unpublishing information p.15, p.40–43 and throughout the handout.*)

Please see the instructions on creating a new page for additional information about editing Page Assets.

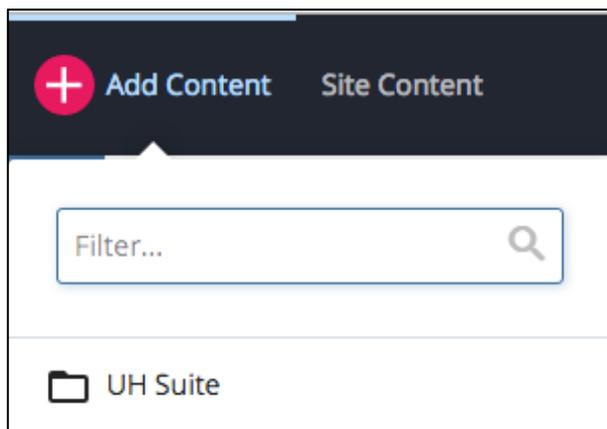
'Relationships' Information

The CMS tracks **Relationships** information for any asset which other assets depend on for imported content or are linked-to / associated-with. *For example:* an image linked into your page via the CMS's internal linking tools is defined as having a **Relationship** to the page displaying it. Each of these assets, the File and the Page, would need to be Published if the File is added, changed, or renamed. (If a File is *removed*, Publish the page and Unpublish the File.) The **Relationship dialog** for an asset (**More button >> Relationships**) will list which other assets may have **internal** linking to the asset you are reviewing, and gives you the opportunity to Publish both it and its Related assets in one step if wanted, with these cautions: only those assets the user has permission to see are being included in that list; and each of the items involved should be vetted for readiness before publishing the entire set. (*In much earlier versions of the CMS Relationships were also known as "Subscriptions" / "Subscribers" Tab.*)

Adding Content: Creating New Assets

CASCADE MENU: Add Content

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

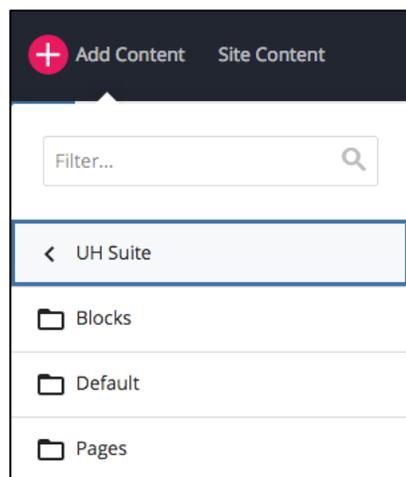


Click on “Add Content”.

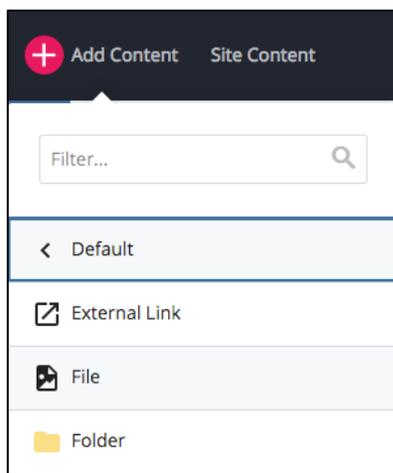
You should then see a pop-out menu offering those assets factories which are available for your use. The options you see there may vary according to which website you may be editing, and/or your User permissions. For CMS Basics training, you should first see “UH Suite”.

If you are looking for a particular asset factory, you can also **Filter** by **Searching** for that name.

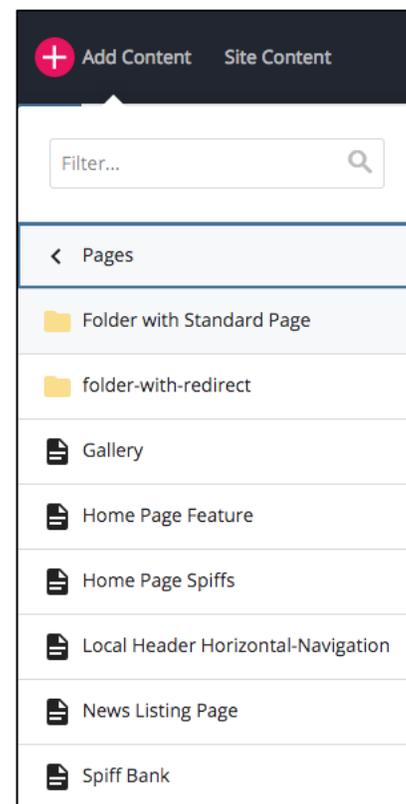
Otherwise, where you see a *black-outlined folder icon* in chooser dialogs, it represents a *container* or *parent folder* for additional items. Click the container to open it. You should then see the parent container's name at the top of a different list (the container's contents), with an arrow indicating you can return to that container's parent.



Choose from a sub-container to open it, or click on the parent container to close it again



Select an asset-factory from within a container to create a new asset.



Generally speaking, a **Default** (plain, or “empty”) **Folder asset factory** creates only a Folder with nothing yet inside, and Metadata settings leaving it out of the Menu and Breadcrumb string. A “**Folder-with-**” **asset factory** will create 2 assets at one time which are allied together – i.e. a page-type asset and its Parent Folder, which provides navigation information (Left Nav Menu and Breadcrumb Links) throughout the section in which its Page resides. It should come with metadata settings already set up for it to be “Included in Menu”.

A **Folder with Redirect asset** can be useful if you want site visitors to have access to a particular page from your area's local navigation menu, but the site structure means the local menu would not ordinarily include that page (for example, a page from another department, or another website). A **Redirect** asset can be created in the local area, pointed to the remote page, and then its Folder set to be *included* in the local Left Nav menu.

A File asset factory – typically found under a 'Default' container - allows you to upload supporting materials into the CMS to be published as a part of your site, and/or to create a text-type file directly from within the CMS (e.g. a *.css stylesheet*). To the CMS, generally speaking, anything which is not a native system asset (e.g. a *Page*, a *Folder*, a *Block*, or a *Reusable-External Link*) qualifies as a File asset. Remember that Files must follow the system naming rules, and in addition they must also retain their appropriate file extensions (e.g. *.jpg*, *.docx*, *.pdf*, *.css*, *.js*, etc.) Please also note: with Cascade version 8, filenames may be modified upon upload by the CMS itself to help users keep good system naming consistency.

If you see multiple Containers under your Add Content button, each with similar contents (as opposed to categories of asset types), it may indicate that there are different sets of asset factories for different areas within your same site. And if so, and even if you have permission to use each of the various collections, **it is important to choose the correct area for your purpose** because this process tells the CMS how to build the new item – i.e. by using the resources which are specific to the appropriate site or area. Choosing the wrong area could mean the resulting items may not work correctly, and/or parts of your site could “break” when published.

Uploading Files

First, locate a file you wish to upload into the CMS. On your local machine, open a directory where you can view your original file.

Then, from your Asset Tree or other List, navigate to and select the Folder into which you wish to place the uploaded File. This selection should predetermine the **Placement Folder** for you. If not, or if you change your mind, you can always *Choose* an appropriate Placement Folder during the upload dialog. *See notes on using Choosers, p.26*

Fill in a Display Name if you anticipate including the new file in a Related Links set.

Next, from your **Add Content** menu, navigate to and select the File asset factory. This will open a File asset dialog.

You do not need to immediately start filling in the File Name (*aka the Asset Name, aka the System Name*) as the CMS will create this name for you once you start the upload process.

Find the dashed rectangle. If you are viewing your original file in a graphical view, you should be able to **drag the file's icon over the dashed rectangle, and the CMS will automatically start the upload.**

Otherwise, **to start the upload:** click on the words inside the dashed rectangle to open a browsing dialog for your computer's system, and proceed to locate the file you want.

Please note that you can **upload a .zip file** also, and the dialog will recognize the file type and ask you to decide where you want to unpack it (or whether you want to store it).

Once the CMS has received your file, you should see the file information show up inside the dashed rectangle.

Now you can either “Save and Preview” a Draft of the target file, to make sure it is what you wanted, or you can go to the **vertical dots button** to immediately **Submit the file for final upload**. Once Submitted, a copy of your file will then become resident inside the CMS and you should see it appear in the Asset Tree and other list views as a File Asset. You can then create dynamic Internal Links to it from your pages, Publish it to your website, and otherwise work with it inside the CMS.

Editing Files

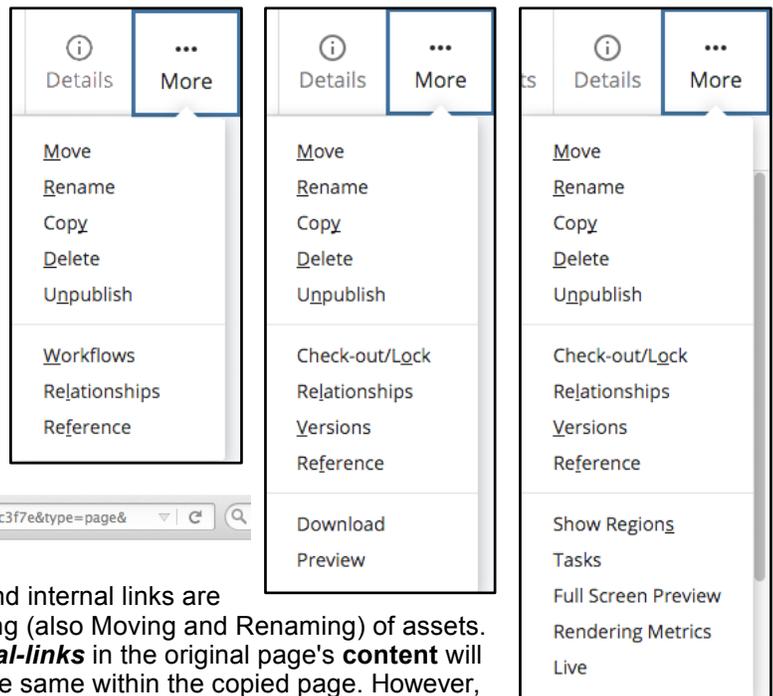
File assets are not dynamically modified within the CMS as, for example, a Page-type asset might be; however, they are granted some limited Editing tools. **Graphics Files** are offered simple options including: size, crop, rotate. **Text-type Files** are offered an Advanced Text Editor with some code-friendly features. All File-type assets may also use the replace-file-contents with alternate-file-upload option – which retains the same system name, but which would still need to be republished, along with any Relationships the File has. An Assets Relationships are reported under the More button. See illustrations following. *See also Relationships discussed, TIP, p.13.*

The More Button >> Copy

New assets may also be created by duplicating an already-existing item, using the “Copy” feature available from within the **More button** options; and then updating any relevant Metadata text and Content to reflect the intents and purposes of the new item.

To the right, illustrations of the More button options for a typical user, for a Folder, File, and Page, respectively.

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 original version and not to the copy.

Also, please note that, by default, the CMS **will not** allow an item **Copied** into its own parent folder to have the same system name; and neither will items with the same system name be allowed upon **Move**. In these cases, an incremental number is added to the Copied or Moved system name if the user does not provide anything different.

By contrast, the Publisher will overwrite items on the Server if item names are identical. This is basically how any web page, folder, or file is 'updated', as updated files are written over previously existing files of the same name and location. Within the CMS, **Versions** information for page- and file-assets is stored for a limited time, however; so previous **Versions** of Pages and Files can oftentimes be restored if desired. Please note that, unlike Pages and Files, Folder assets do **not** retain Version information.

CAUTION: *If you have editing access to multiple Sites, you may be able to copy items from Site to Site. This should work without issues for most assets (e.g. Files, Folders, and Blocks); however, Page-type assets may “break” in a variety of ways. For example, they may still be trying to link to resources from their original Site – such as a picture which actually resides elsewhere. Such a link may need to be re-worked.*

*Often, the copied page will fail to Publish. If the copied page will not Publish from its new location, you may need to contact either Web Technologies or Web Marketing to adjust the underlying CMS resources which allow the new site recognize it as a publishable asset. Usually, this will be the page's “Content Type” – please see: **Details button >> Design panel** to determine from where a page is drawing its Content Type. And having said all that, remember that you should first always check to make sure an asset and its parent/folder-hierarchy is actually **set** to be Publishable.*

How to Check an asset's Publishability and/or Indexability:

For a Page or File look under: **Edit >> Configure >> Include when publishing**

For a Folder look under: **Edit >> Properties >> Include when publishing.**

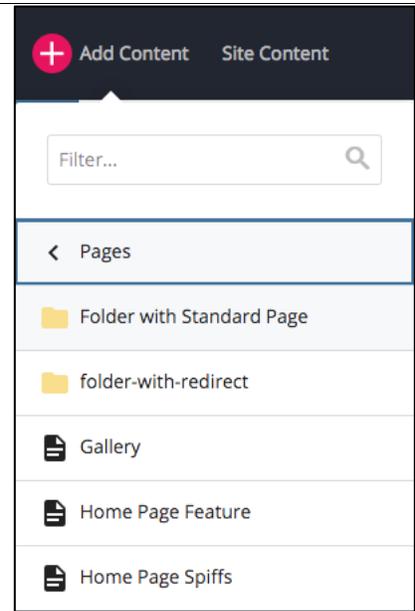
Creating a Standard Content Page

Ultimately this asset factory will create a new menu-included Folder with a blank Page already inside it (a page named "index"). It helps to remember: the way the UH website CMS is set up, there is only one default page per folder, and its system name / asset name is always named "index". All *descriptive* naming associated with this page should be assigned to its *asset Title and Display Name*, and to its **enclosing (aka Parent) Folder's asset Title**.

HOW TO DO IT:

1) First, from the asset tree or other view, **select** the folder you ultimately want the item to be created inside of, so the CMS will know where to put the new item. This could be the home folder for your site, or any folder within your site. (Alternately, you could choose or change this "**placement**" folder after starting the Asset Factory.) This pre-selection process should work for placing most new assets, with some exceptions – e.g. News Articles, which are designed to go only to specifically scripted folders.

2) Then, from the **Add Content** menu, navigate to the **Folder with Standard Content Page Asset Factory** (exact asset factory name may vary, just as the Asset Factory's location within your Add Content menu may vary).



IMPORTANT FOLDER-WITH-STANDARD-PAGE SET-UP INFORMATION:

The CMS asks mainly for information about the **Folder** at this point, because, in a sense, the important **page-asset information** has already been pre-determined – as you will see later once you begin to Edit the new empty page. (You will then see certain fields filled by **placeholder** text which you will be expected to update before publishing the page. Additionally, please note that any information you use to create this pair of assets you will later be able to change at will if needed [as long as you remain aware of how the change impacts your site structure]. See p.25 Edit >> Content dialog.)

3) **Folder Name:** In the CMS, the name attached directly to any asset, the asset's "name" is called its **system name**. Thus, here we are considering the system name for the Folder which will be home to the new page (the system name for the page has already been determined to be "index"). Remember, UH filenames conventions apply here. (See additional notes on system names: p.39)

The Folder's system name will be used not only for identification purposes but also to build the final web address for its enclosed page. For example, if you name a folder "**science**" then the URL to get to the default web page inside that folder might read: <http://www.uh.edu/yoursite/science/index.php> or <http://yoursite.uh.edu/science/index.php> (depending on how your site is setup).

4) You should already see your pre-selected **Placement Folder** listed – read the path appearing below the "Placement Folder" chooser field. If it is not correct, or if you simply wish to change it, click on the field and use the **browse** portion of the chooser dialog which will slide in from the righthand side of your browser window.

TIP: Only use the "Recent" suggestions if you are certain they are what you want – as the CMS is only listing places where you have been, and not necessarily listing places appropriate for your new page placement.

5) The Asset Title – in this case, a Folder Title

The Folder Title text you enter here will be used in a number of different ways. The first two listed below, represent how the Folder Asset itself may be identified within the CMS interface. Items 3 and 4 will actually be rendered into the visible content of the child page itself and into any peer pages as well.

1. The Asset's identifying Name in the top white bar of the Information, Editing and Actions panel
2. May also represent the Folder asset itself in the Asset Tree and in other CMS Lists and Reports if you have your *Appearance of Asset Links User Setting* selected for using Titles or Display Names.
3. Provides the linked text in the **Left Hand Navigation Menu** which represents this Folder's default child page – aka the "index" page. By default, this Linked item will appear throughout its section's Left Nav Menus, including being on the section's home page, so that site visitors can navigate to this new Folder's default child page from anywhere within the section.
4. The text in the child page's **Breadcrumb** string representing the page itself. Usually is not linked, as it represents the page the site visitor is currently viewing.

Please note that, unlike Asset Names (aka *System Names*), neither the Title nor the Display Name need to follow UH filenaming conventions. Each of these can be more grammatical, using initial capitals and including spaces – in fact, it is even recommended! However, do please avoid all caps, if possible, except for acronyms and the like.

6) Display in Menu – Display as Header

By default, this item will be expected to Display in the Menu. Only uncheck this if you do not want this page to be in the left nav menu – e.g. if the item is still in development and not yet ready to be in the menu. Choosing Display as Header will reset the Left Nav Menu to start with this asset as a sort of sub-home item, at the top, and then listing only child items for this folder itself – e.g. appropriate for a home page for a department within your division; and/or if your site's sub-menus might otherwise become far too deep and unwieldy (in which case a list of links on this section's initial page might be better, to provide an alternative kind of navigation for the site).

CAUTION: If you see a selection here referring to mobile site navigation, be cautious. Only select this if you are sure your department is included in the mobile-specific site, which has very few selected users and is a web area which has been deprecated for the UH website. Seeing this option may also indicate that your site resources need to be updated. Please contact Web Marketing or Web Technologies to see whether metadata sets might need to be updated for your site.

7) The Display Name – A Display name for a Folder is less critical than that for a Page or a File, as it is not used as link text for things like Related Links Sets; however, it does have the potential to be used by the CMS system to indicate the folder's identity in system reports, where an Asset's Title cannot be used instead.

Finally, Click Submit to create the Folder with Standard Content Page.



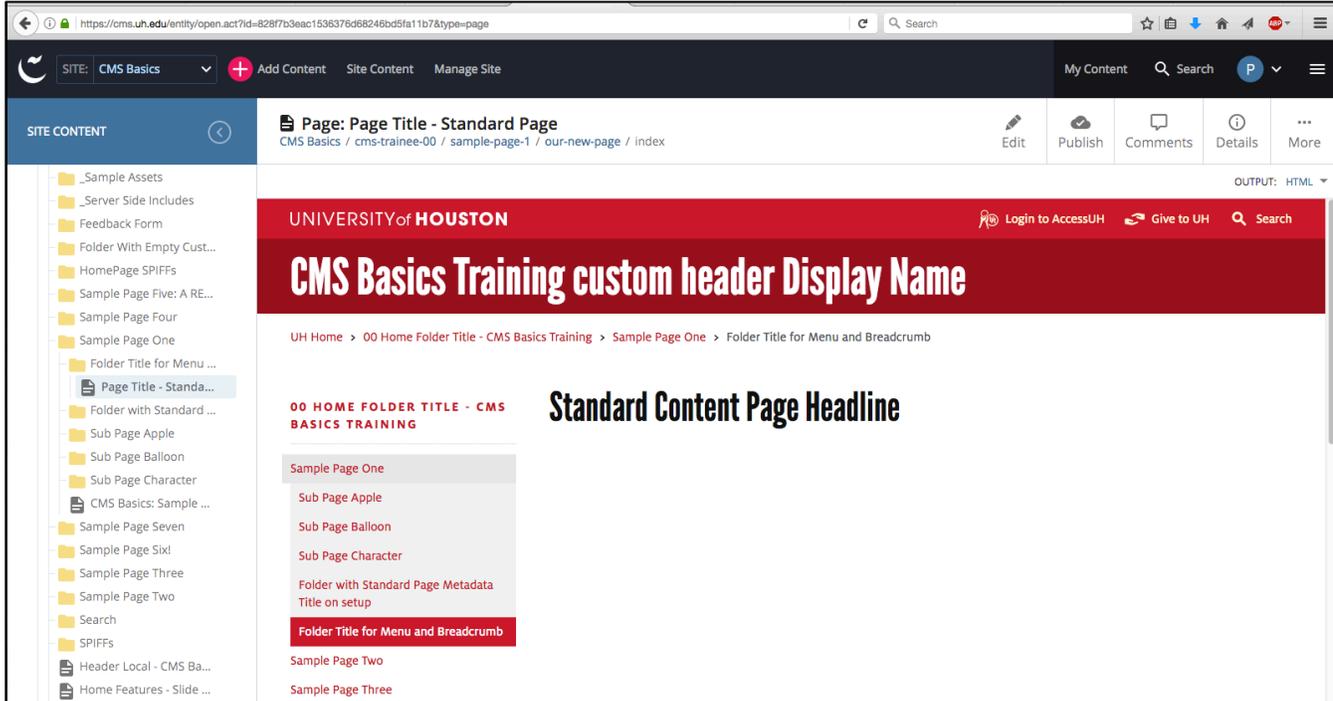
The New Folder's Information panel, with the new page showing in its parent Folder's Contents List

Name	Order	Type	Last Modified
Page Title - Standard Page	1	Page	a minute ago

You should now see the new Folder with Standard Content Page appear in your Asset Tree – with the Folder selected as the active asset, and showing the Title and system name it was given. The page still carries its creation-default information, such as its default Page Asset *Title*. Remember, the Page Asset *Name* should not be changed, as the CMS system expects it to remain "index", but other default placeholder information you will need to change.

Click on the page from either the Folder's Contents List or the Asset Tree to open the new Page itself.

You are ready to start customizing the Page for your Site and adding your Content.



Many of your editing choices in setting up a page will relate to specific visual areas of the page asset itself.

Review the Page illustration following which outlines some of the jargon used to describe a webpage at the University of Houston. Many of these terms are common to the web community in general, while some are unique to either the Cascade CMS and/or to the university itself.

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 structure, organization, and information architecture of your area's overall website.

Bear in mind that the CMS does provides users with a number of safety nets to keep them out of trouble. Settings can be altered at will; a number of asset Versions are stored for pages and files, making it easy to back out and restore an earlier version if desired (see More button); Draft versions can be developed before being Submitted as active assets; publishing to staging allows users to see how their pages not only work but also how they function in the same UH server environment as the live site. There is usually even a 2 week window in which Deleted assets can be restored after being Deleted (see Trash icon at the top of the Asset Tree panel).

So: please feel free to experiment a little, to get your pages the way you want them to be, and to become familiar with all the various options available to you as a site editor.

Please also note: There are a variety of different types of page asset types. The Page displayed above and the page illustrated following are Standard Content Pages. Different page types are designed to accommodate different design features.

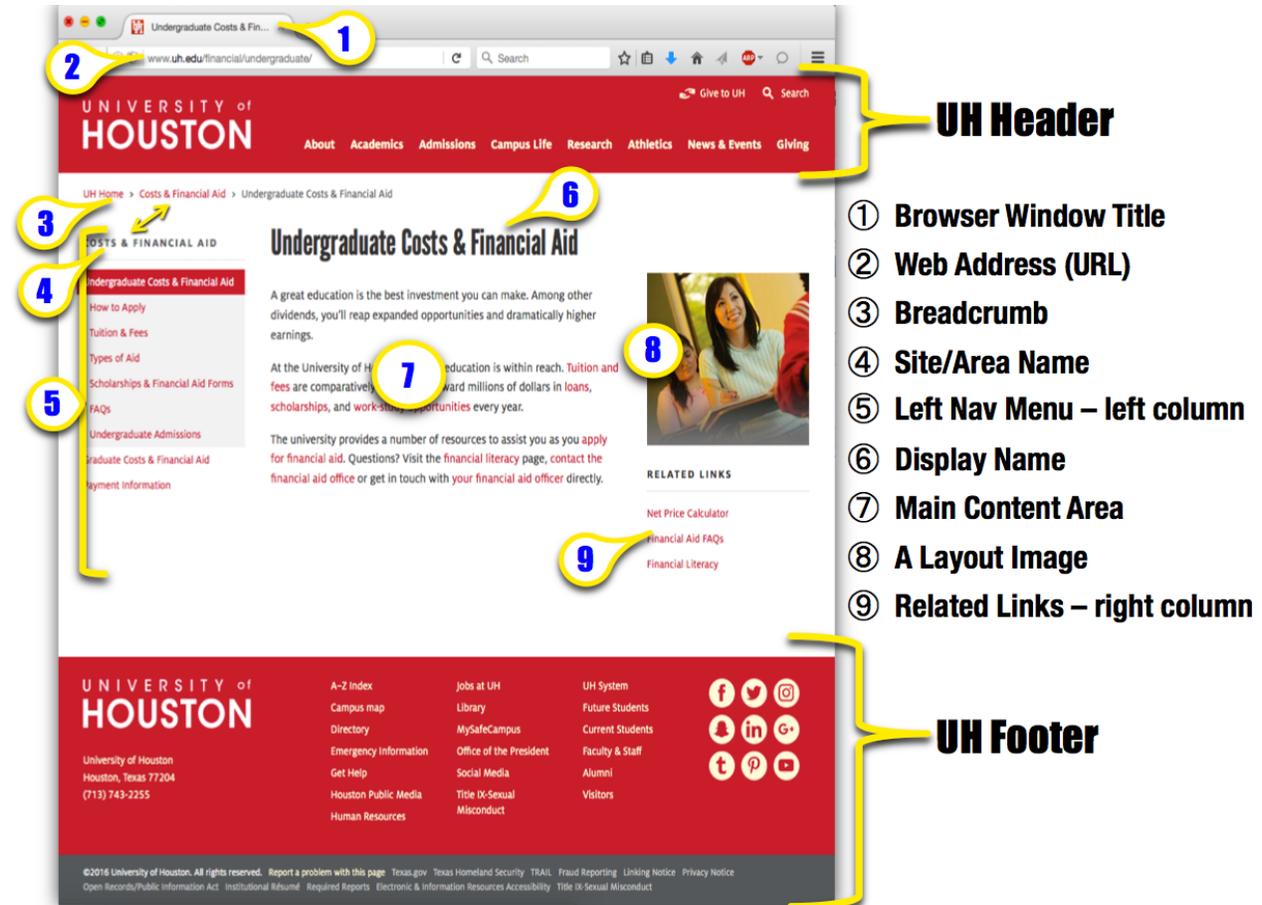
For example, a standard Home Page is able to incorporate outside elements such as the content of other specialized page-type assets which are dedicated to a specific purpose (e.g. Feature Slide Show, Home Page SPIFFs row) and certain specialized types of blocks (e.g. Social Media Widgets, UH News feed), whereas a Standard page cannot.

Additionally, some of the more customizable Home and Landing type pages may require editors to have significant levels of web development skills in order to leverage their potential. Custom coding, within UH Web standards, is also accommodated by several of the page type assets; however tech support is not available for implementations at that level.

And please remember it is always the responsibility of the content owners to ensure Site content meets UH standards. Review information online, and/or contact Web Marketing, Web Technologies, and/or UH Branding for further information.

UH Webpage Jargon

The following illustrates some of the most common terminology used to describe the various parts of a typical University of Houston webpage. Some of these relate directly to the page's underlying "Regions" structure, some to the Editing dialogs, and some to general web jargon.



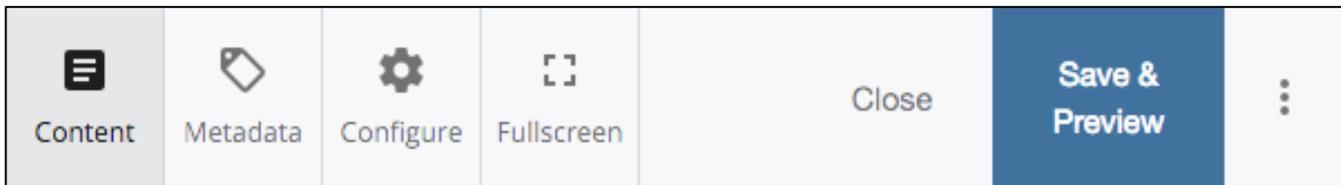
As you are setting up a new page, make note of how your content editing options relate to each of these:

UH Header	Default used unless custom header called – then "header-local" asset called by the <i>Home</i> page type.
1) Browser Window Title	Edit page >> Content dialog >> <i>Page Asset Title</i> field. See p.25
2) Web Address (URL)	Nested Folders' system names: all ancestors back to site home – <i>plus</i> page/file system name – <i>plus</i> .php for page-type assets. Excludes site root folder, which becomes the initial stem; e.g. http://www.uh.edu/yoursite/
3) Breadcrumb	Nested Folders' Title metadata: for page's home folder & all direct ancestor folders back to the site's home folder – may also include site's parent[s] – always includes UH site home.
4) Site / Dept / Area Name	Site's or area's home Folder Title metadata; based on folder's <i>Display as Header</i> setting. P.21
5) Left Col/Nav Menu	Page-bearing Folders' Title metadata. See also: p.38 Discussion: Navigation Menu, Breadcrumbs...
6) Display Name	Edit page >> Content dialog >> <i>Display Name</i> field. See p.25
7) Main Content Areas	Edit page >> Content Dialog >> various [including WYSIWYG/HTML editors, Choosers, etc.] See p.25
8) Layout Images	Edit page>> Content dialog >> <i>Page Banner</i> section – image Choosers. See p.25
9) Related Links Sets	Edit page >> Content dialog >> <i>Related Links</i> section – set building tools, Choosers. See p.29
UH Footer	Default footer used unless site uses custom footer – then Home page type calls "_ssi" folder item

For additional notes see: <http://www.uh.edu/infotech/services/web-services/cms/cms-how-tos/change-non-content-page-items/>

Standard Page – Editing Options and Settings

The Page Asset Editing panel consists of three dialogs: Content, Metadata, and Configure; as well as a Fullscreen toggle to allow the editing panel to be expanded in size for easier editing.



In addition, there are more options for saving Page changes than there were for Folders. Unlike Folders, Pages (and Files) can accrue Versions and be saved in Draft form. Pages can also be comprised of a wide variety of types of content. The **Content** dialog has the most to it, so we will look at the **Configure** and **Metadata** dialogs etc. first.

The **Configure dialog** offers a lot of information about the page structure, for those who are interested – however, the typical user will not need to change most of these settings. The most often needed settings from this dialog are the ones at the top: Include when indexing; Include when publishing; and Maintain absolute links when rewriting.



Include when indexing – this setting allows assets to share Metadata with the CMS system. Without this sharing, the dynamic navigation building cannot function correctly. There are only a few reasons for un-checking this option – such as removing a news article from a listing; or rendering stored materials inert. *See also p.15 notes.*

Include when publishing – this setting can be very important to managing your site materials. When enabled, the material is eligible to be published to the server via any enabled Destination. If setting is disabled, the material cannot be published. Remember: even though an individual asset (e.g. page) is set to be *included in publishing*, that setting can still be overridden by its parent folder or other direct ancestor folder being set to *not include when publishing*. Publishing can only be *switched off* through inheritance however, *not switched on*; thus, a parent folder set to be *included in publishing* does not force any child item to become publish-enabled.

Maintain absolute links when rewriting – this setting affects how the CMS translates internal links into web addresses, and should usually stay off unless there is a specific reason to switch it on. There are only a few instances where this setting should be enabled – such as a Custom Header Page Asset using its Custom Menu bar.

The **Metadata dialog** allows you to include search engine optimization information (summary, teaser, keywords, author); as well as providing tools to help you manage your content and keep your materials current: Start Date, End Date, and Expiration Folder choosers, as well as Review Date chooser. Pages with a Review Date selected will show up in the **Content To Review** report for your site; so, for example, you could set a particular page to be reviewed a month out from the start of the fall semester, and during that window the report could be filtered to show items set for review within 30 days, and it will bring up that asset link to remind you. With the Start, End, and Expiration choosers, you could manage date-sensitive materials – automatically publishing them when called for, and automatically unpublishing them and setting them aside when they are past their shelf life.

The **Fullscreen** button allows you to expand your editing panel for easier use of some of the editing dialogs.

Selecting “**Close**” allows you to leave the **Editing** panel without saving changes (Draft may still have been saved).

Save and Preview is an option new with Cascade 8 which allows you to see a Preview of what you have done while an asset is still in Draft mode. The Preview is flagged as a Draft and gives you an opportunity to continue Editing, Discard the Draft, or Submit it as the active version of the Page.

The **Three Vertical Dots button** is a shortcut to allow you to Submit the changes you have made directly to the active asset. This will not discard any Draft form of the asset you may have stored, and it will still allow you to note a Comment about the changes you made, for Version selection reference.

Note: previous **Versions** of an asset [states at which Edits have been Submitted to the active Asset] can be seen as a list by choosing the **More** button > **Versions**. Each Version is numbered, for ease of communication between users. A Version can be Restored to replace the active Asset if desired.

A Draft version of a page, marked as Draft, with VIEWING options open. Users can select to view either the Current, aka active, or Draft version of the page asset.

The **Content dialog** allows you to determine what materials your page will contain and what features it will display. Depending on the specific types of pages you ultimately create, you will see different aspects to the Edit > Content dialog. The following discussion will walk through a typical *Standard Content Page*.

<p>Display Name</p> <input type="text" value="Standard Content Page Headline"/>
<p>Title *</p> <input type="text" value="Page Title - Standard Page"/>
<p>Description *</p> <input type="text" value="please replace this text with a descrip:"/>

Display Name, Page Asset Title, Description

You will need to replace any placeholder text you see populating these fields. These notes will guide you as to what text will be used where for your page.

For a Page Asset, the **Display Name text** will appear as your main Headline, top center of your page. Replace the default text with your own Headline.

NOTE: *apologizing in advance here for any confusion caused by the new v.8 feature which allows the page's structural Regions to display on rollover – because in this particular instance, it reveals that the Region where the asset's Display Name shows up is confusingly called "Page Title". Please know that the Region called "Page Title" is NOT related to the page asset's Title field.*

The **page-asset's Title field** provides the text for the tab or title bar that appears at the top of the browser window which ultimately displays your published web page. You will need to replace this text with your own as well. Be relatively brief – identify your site and the page's purpose succinctly and consistently with other pages in your site.

The **asset Description field** provides text which search engines may display when delivering search results. You will need to replace this text as well. Include information about the purpose and content of your page; choose words or brief phrases (a string of items each separated by a comma) which could convince a site visitor that your page is the authoritative source for the information you are providing.

The Standard Page Content Editing Sections – shown here with all collapsed, for illustration purposes*

Standard Page	
▼	Open Graph
▼	Page Banner
▼	Content
▼	Additional Content
▼	Related Links
▼	SPIFF Banks
▼	Settings

A typical Standard Page has several general content editing sections, sometimes known as **Data Definitions: Open Graph, Page Banner, Content, Additional Content, Related Links, SPIFF Banks, and Settings**.

The Open Graph section provides a way for you to include an image which will be used as a thumbnail for social media venues. This image will not display on the webpage itself. If no image is selected, a generic UH icon will display instead.

The Page Banner section allows you to choose either: a static horizontal banner image, which will span both the central and right hand columns and sit at the top of your page's content area; or a column image, which will display at the top of the right-hand column only. See also notes for the *Settings* area.

The Content section has a number of sub-sections. The primary content editing areas consist of *WYSIWYG Editors*, which offer many of the familiar rich-text editing tools most users are familiar with; a field for you to include a *Sub Header* (which will appear in a smaller font directly below the page's main Headline / Display Name); *Choosers* to allow you to associate various types of Files and Blocks with your page; and an embedded HTML editor to allow you to edit the HTML for that section of the page directly, and/or integrate HTML content which was developed outside the CMS.

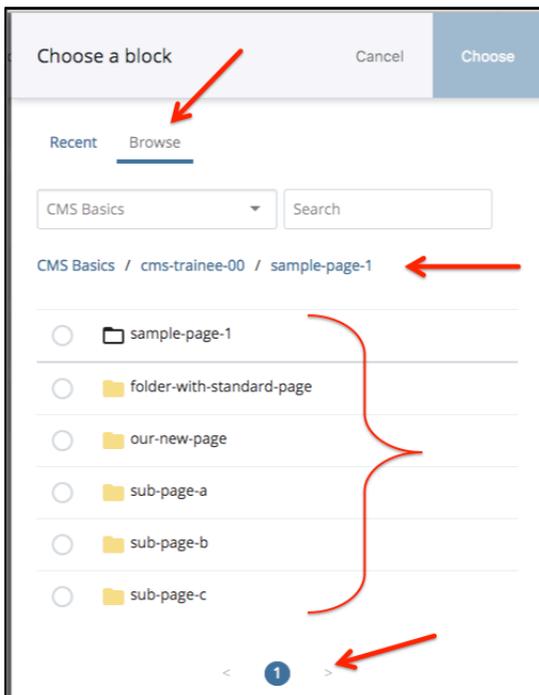
***TIP:** *a section header with an arrow to the left side can be clicked to expand or collapse that section for convenience. In the illustration above, some of the sections are shown collapsed, but usually appear expanded by default.*

Choosers = Internal Linking Tools

Choosers look very much like text fields; however, if you roll over them you will see them highlight, and if you click on them, you will activate a browsing dialog which slides in from the right side, over top of your browser window. *Choosers* allow you to associate another asset with your page, which the CMS will then recognize as an **Internal Link** – i.e. a dynamically tracked association between assets within your site.



A *Chooser* with no association set will display a phrase letting you know what to choose: e.g. Choose Block – as well as an icon indicating what type of asset it expects you to link to (in the example above, a Block type asset).



From the *Choose* dialog, select the **Browse** panel.

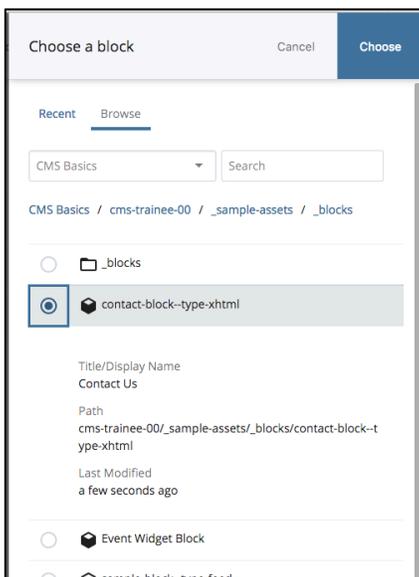
You should only select from the *Recent* list if you are *certain* the items there are what you are *currently* looking for.

From the Browse panel you can navigate to where the asset you wish to link to is stored within your site.

If you have access to multiple sites, you can select another Site. You may also Search for the name of the asset. Below the Site Selector and Search field, you will also see a system path you can use to navigate; it may start from where the page is which you are editing and initiated the *Chooser*. Each folder in this path has a link to take you into a browsing view of its contents.

Below the path you will be able to either select items or open up folders to find additional content to choose from. A black and white outlined folder appearing at the top of a list represents the parent folder for any contents appearing below it. Click on a child folder name to open it as another parent folder.

Be sure to check if the panel is displaying all the items available for you to choose from. If you see more than one page indicated, you may have to page through to find the material you are looking for.



Once you have located the item you want, click the *circle button* to the left of the item to select it as the chosen asset for your Internal Link. Additional identifying information will appear below the selected item.

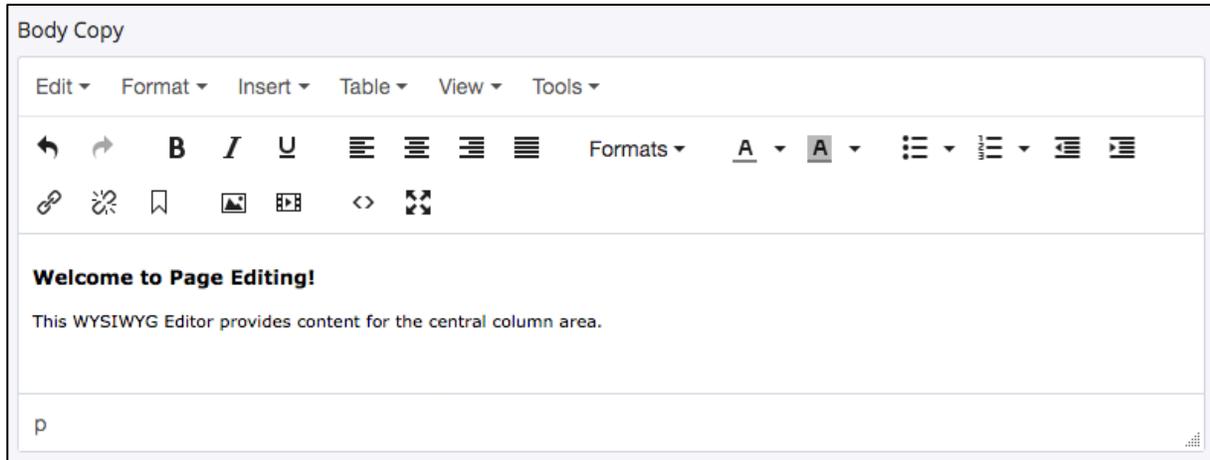
Click the **Choose** button to accept the choice.



Once selected, you will see the asset name in the Chooser itself, and the path to the asset displayed beneath it. If the path is longer than the Chooser button, you may hover your cursor over the path and a full path will appear.

In the case of this Contact Block, the information from the contact block will be displayed in the left column of the page, beneath the Left Navigation Menu – once the page is saved (Submitted as Draft or as the Active Asset).

WYSIWYG Editors – What You See Is (pretty much) What You Get from rich text editors.



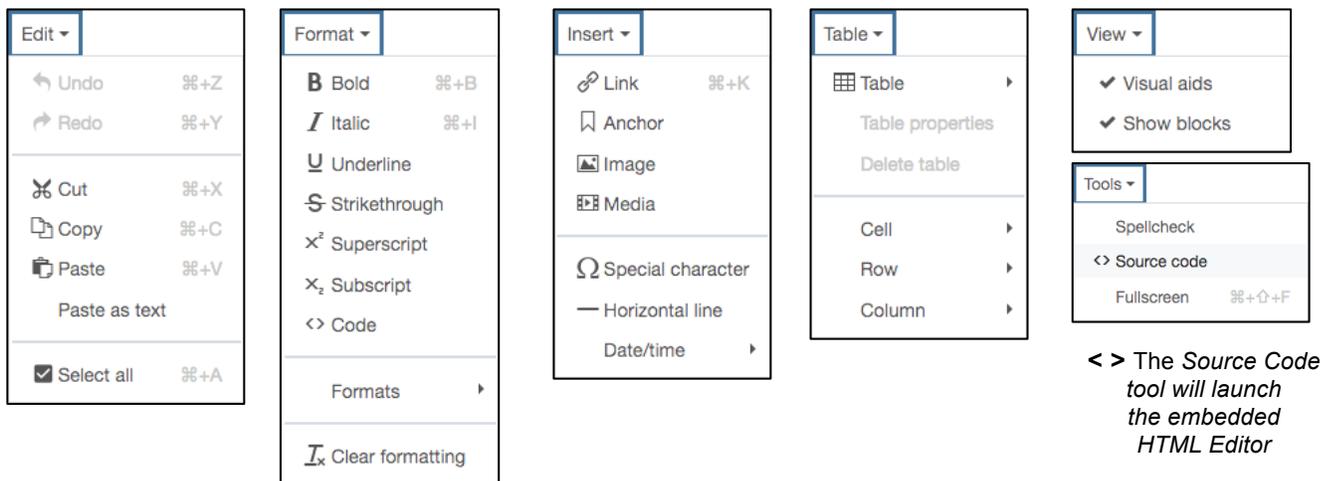
The primary content for your page's central column can be developed through the main WYSIWYG Editor; for this page, called the *Body Copy* editor. It should work in a way familiar to most word processor users – it is basically a rich-text editor – just remember the CMS is helping you build a web page, and not a print document.

Also note that in Editing view, not all the UH styles are yet applied as they will be when you Preview the page. So if something does not look or work quite like you think it should in the WYSIWYG Editor, but looks okay in Preview, you may still be okay. On the other hand, if something does not look or work correctly in the Preview – and especially if something doesn't work correctly when published to Staging – you may have some work to do.

Within your pages you may also see **other WYSIWYG editors**, dedicated to funneling content specifically into the page's **Left Column** and **Right Column** respectively. For the Left Column, content falls below the Left Nav; for the Right Column, content falls below a *Chooser-included* Column Image, if any is selected.

WYSIWYG Editing Tools and Popouts

The following items illustrate various editing tools and options available from the WYSIWYG Editor. Your material will need to be appropriately selected for you to use each tool, and/or for greyed out tools to appear active.



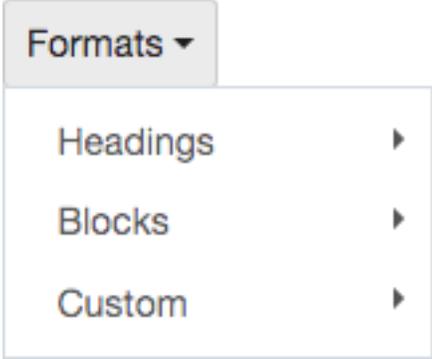
< > The *Source Code* tool will launch the embedded HTML Editor

With a WYSIWYG Editor, you can type directly into the editor, or paste in text from other sources. You can insert and edit Links, Graphics and Photos, Tables, and other content. You can also view the HTML version of this WYSIWYG's content by clicking the angle bracket icon to open the embedded HTML Editor, or by looking under *Tools > Source Code*. And you can assign or reassign Formats.

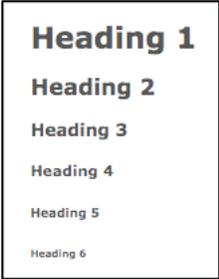
Assigning Formats correctly is important for your content, as it can not-only help the UH Styles apply correctly, but can also help search engines make “semantic sense” out of your webpages as well.

Note: If you copy material in from outside electronic sources (e.g. MS Word or another of your online web pages) the CMS will try to recognize and retain the existing Formatting. If you do not wish to keep the previous Formatting, and/or it is in conflict with UH styles, you can try stripping out existing formatting before pasting it into the Editor. Select 'Paste as Text' mode to eliminate a lot of extraneous, possibly proprietary formatting, while retaining basics, such as bold, or italic. To strip out all formatting and start cleanly, paste first into a *plain text editor*, such as *Notepad*, and then copy again from there for the final paste into the CMS WYSIWYG.

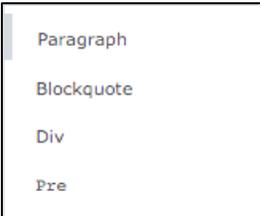
The WYSIWYG Editor provides a number of tools to let you assign the **Formatting** you want for your page.



Headings: HTML



Blocks: HTML



If you see a grey bar beside an item, that means the selected content already has the indicated Format applied. Selecting it again should remove the indicated Format.

Not related to the Block asset type.
See p.44

Custom: CSS

The Custom Formats menu allows you to apply selected UH styles.

Table formatting:
table, table-striped;
apply to whole table

Wrap text around picture:
pull-left, pull-right;
apply to image itself

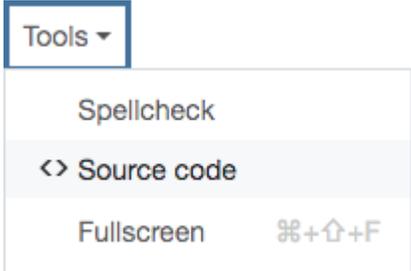
Introductory paragraph:
lead

Create Button effect:
btn, btn-primary;
both are needed

Dialogs may only allow adding one style at a time. To add more, edit the class statement using the HTML editor.

The most fundamental HTML Format you want for your text is Paragraph, which can be selected under the Blocks selections. Once text is formatted as a paragraph [< p > tag in the HTML] it can be further formatted in various ways; e.g. indented, made bold, made into a List, etc. *Note: unless you are familiar with HTML, please avoid applying Div and Pre to your content.*

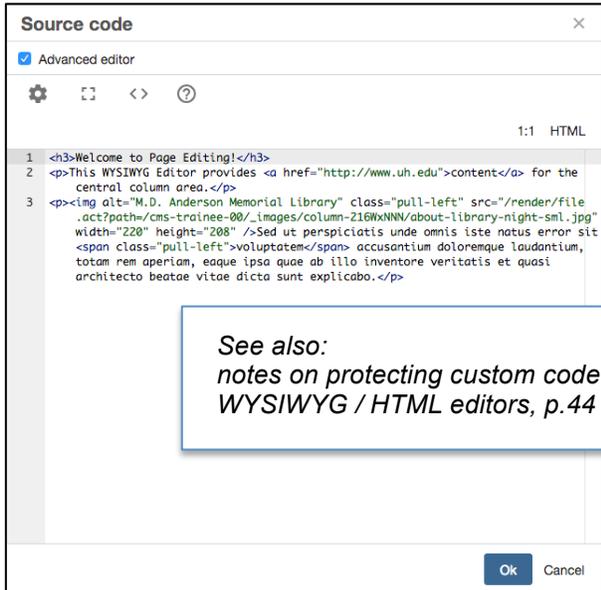
The embedded HTML Editor: <> Source Code Tool



The embedded HTML Editor can be launched by selecting the angle brackets icon from a WYSIWYG Editor Toolbar. It can be toggled between Plain Text and Advanced modes, and has a number of code-friendly features.

Keep in mind that the Cascade CMS is always building an HTML code version of your materials as you

work in WYSIWYG mode anyway, so you can look at the code view at any time if you wish. If you feel comfortable working with web page code, you can also edit directly in code view, and/or develop code outside the CMS in a 3rd party editor such as Dreamweaver, BBEdit, Notepad, etc. and then copy and paste your code into the HTML editor. The CMS will integrate it into your page asset just as it does for material developed directly with the WYSIWYG editing tools.



*See also:
notes on protecting custom code in WYSIWYG / HTML editors, p.44*

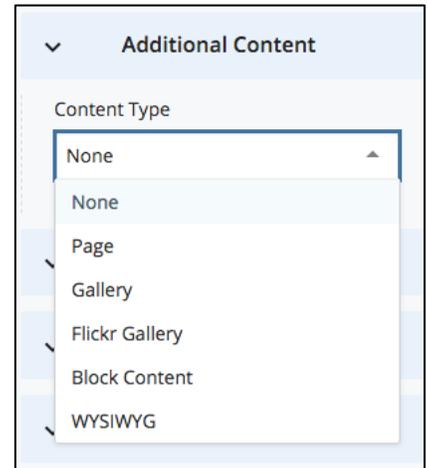
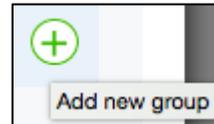
For additional general information about the Cascade WYSIWYG, HTML, and Advanced Editors, please also see Hannon Hill's site:
<https://www.hannonhill.com/kb/WYSIWYG/>

The **Additional Content** section content will appear below that from the main WYSIWYG editor of the **Content** section. This section allows you to pull in content from the main content area of another Page in your site, pull in an image Gallery, a separate content block, or append the content from an additional WYSIWYG editor. Use caution in pulling in other page asset content, as you are then responsible for ensuring that both pages are publish-ready at the time of publishing this page.

This multi-type-selectable section can be also be duplicated, if desired.

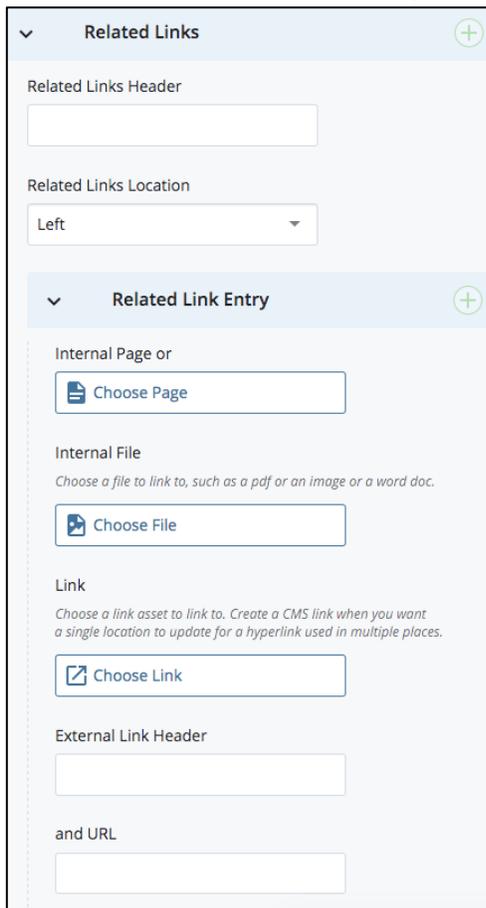


TIP – wherever you see a green 'plus sign' icon, it indicates that the item can be duplicated to allow your page to use multiple instances of it. When multiple instances exist, you will also see an indicator telling you how many and in what order they appear.



Order can be changed with the arrow tool, to push items up or down as wanted.

The **Related Links** section allows you to build a list of specially styled links, which are designed to display on a Standard Page in either the left or the right hand column.



Related Links are intended to provide additional interest to your site visitors, but are not designed to be used as site navigation. For example, a new student looking at college admissions information might also be interested in how to get advising, or tutoring, or even where to find dining options while visiting on a conference tour, even though those things are not part of the actual admissions process.

To Create a Related Links Set

- 1) Enter a Header** for the list. This can be anything that characterizes the collection of links. The most used header is simply: "Related Links".
- 2) Select where** this list should appear on the page. Related Links list sets can be placed either in the **Left Hand Column** under the Left Nav Menu, or in the **Right Hand Column**, where they will fall under any Column Image that may have been selected, or at the top of the Column if nothing else is there.
- 3) Create at least one Link** for the list to render onto the page correctly. You can create either an **Internal Link** or an **External Link**. For an *Internal link* you have 3 *Chooser* options – a Page, a File, or a Reusable External Link Asset. The link text will be drawn from the linked item's Display Name, so be sure to check your File and External Link Assets to ensure something appropriate exists there. For an External Related Link, you must supply both the text for the link (here called the "External Link Header" and the actual URL (e.g. <http://www.uh.edu/about/>)



Here again you will see a "Plus Sign" for each of these items, indicating that you can make additional instances of links, or even of entire Related Links sets. Once multiples exist, the number of items in the set is indicated, and pieces can then be reordered using the arrow tool.

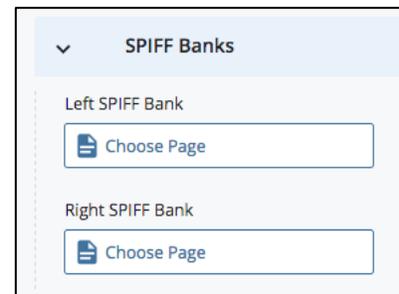
Related Links, cont.

Please note that if you see *Choosers* for *Related Links Blocks*, they require a specially designed block to function correctly. The block would then allow the same set[s] of Related Links to appear on which ever page you wished without having to build the same set manually for each page.

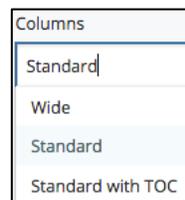
Alternately, a Related Links styled list can be created in the HTML editor using an `<h4>` header, nested inside a `<div>` which has been assigned the "related-links" style. For example:

```
<div class="related-links">
  <h4>Related Links</h4>
  <ul>
    <li><a href="http://www.uh.edu/">examplelink one</a></li>
    <li><a href="http://www.uh.edu/about/">examplelink two</a></li>
  </ul>
</div>
```

The **SPIFF Banks section** allows you to include in your page a SPIFF Bank type asset's content, which is one of the *specialized* types of Page Asset, created separately, and which consists mainly of one or more sets of 'SPIFF's (*Special Interest Features* feature) each comprised of: a brief headline; an image; a short blurb about the story for which you will create a full page to link to elsewhere in your site; and the link to the full story page. For an interior page such as the Standard Content Page, one set of information (one SPIFF) will rotate with alternate, randomly selected set[s] on page refresh. A Home Page type Page Asset uses a SPIFF type specifically designed for it – where SPIFFs are displayed in a row at the bottom of the page.

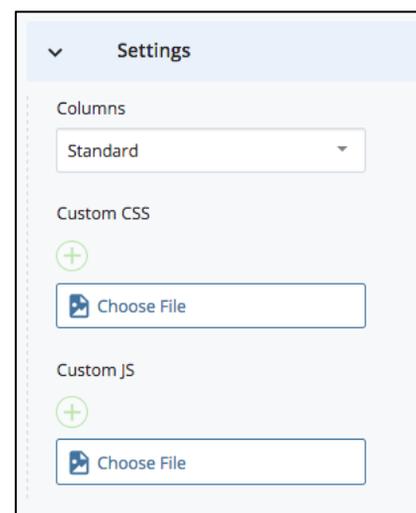


The **Settings section** allows you to choose whether to have the right-hand Column content displays (yes, if Standard); or if the central column is allowed to become wider and hide it (Wide); or if the right-hand column will be dedicated solely to a Table of Contents floating navigation palette (Standard with TOC).



The *Custom CSS* and *Custom JS* choosers will allow you to link in stylesheet(s) and script(s) respectively.

Note the green plus sign with these items – which means multiple files can be hooked in if desired. Attaching a file in this way will write the file call into the web page itself. To call styles throughout an entire site, you will need to use an Override-type link-in on a Home Page asset type. Hooking a file in there will push the call throughout the entire site.



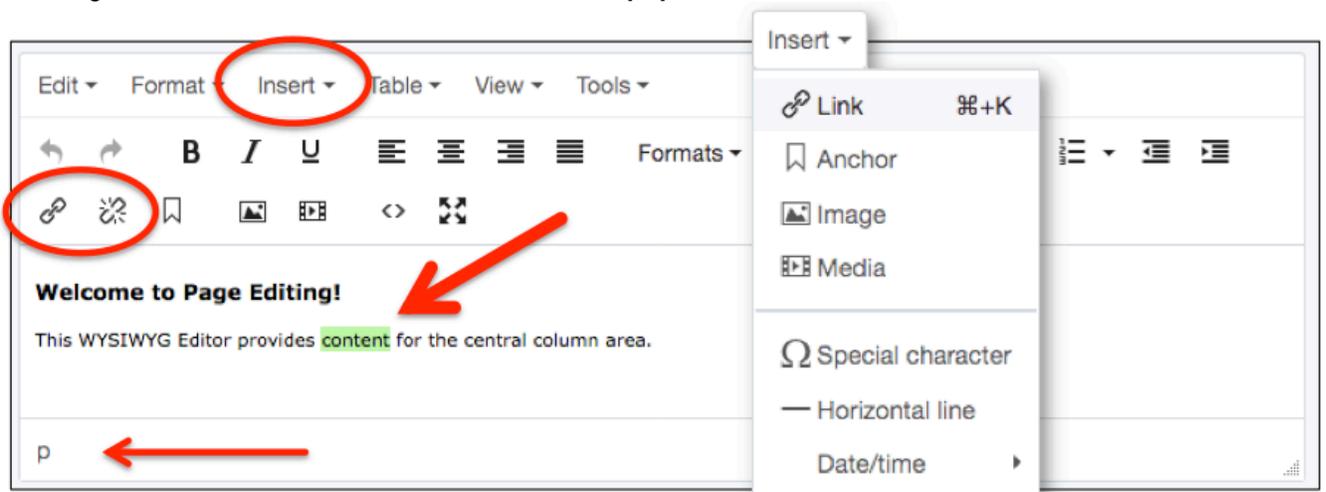
Inserting Links

Within a WYSIWYG Editor window, create the content which will either carry or contain the link. Both text and images can carry links, but most typically a word or short phrase will do the job.

Please choose words to carry the link which will be descriptive to a person who may be visually impaired and using a text reader when visiting your site (e.g. three links that all read back as “Click here” do not offer much to go on; better to hear something more like “application download”, “download instructions”, “submit completed application” and so forth, so a meaningful choice could be made).

HOW TO DO IT

Highlight the text which will carry the link. With the text highlighted, open the **Insert/Edit Link dialog** by choosing the **Link Icon** from the toolbar or the **Insert popout menu**.



TIP – You may also notice information in the very left-hand lower corner of the WYSIWYG editing window. In this instance, it indicates the WYSIWYG recognizes the highlighted text as already having the Paragraph Formatting applied.

Insert/edit link ✕

Link Source Internal External

Link Index ✕
CMS Basics: /cms-trainee-00/sample-page-1...

Anchor

Text to display

Title

Target

Class

The Insert/edit link dialog will open. Choose between creating an *Internal Link* or an *External Link*. Most of the Links in your Site will probably be Internal, to take advantage of the CMS' dynamic link management; but oftentimes an External Link is needed.

Use the *Link Chooser* to *Browse* for the asset you wish to link to within your site. Once it is selected, you should see information about it there, and a path below the Chooser which tells you exactly what you are linking to. If that path is cut off by length, hover your cursor over it and the full path should appear.

Enter an **Anchor** name if relevant when linking to a webpage. Entering a **Title** for the link can aid accessibility – and so is recommended. Give the site visitor an idea of what they will be linking to – you might use the title of a PDF, or the destination page's headline – something the site visitor can instantly see which tells him or her they got to the right place or downloaded the expected thing.

Target has to do with opening a new window for the linked item (e.g. page or file). The default of same window (“none”) is recommended UH best practice, as it helps users stay oriented, they can use their back button, and it creates less open window clutter. The **Class** popout offers additional UH CSS styles, but are not required. [See p.28.](#)

Click Ok to insert the link in the WYSIWYG editor. Submit the page as usual to preserve your update.

Removing or Altering a Link – To later change or eliminate the link, instead of first highlighting the text, you need only make sure your cursor resides somewhere inside the boundaries of it. Then, again open the **Insert/Edit Link dialog** to change the link; or alternately, select the **Broken Chainlink icon** to eliminate the link.

The screenshot shows a dialog box titled "Insert/edit link" with a close button (X) in the top right corner. Below the title bar, there are two sections. The first section is labeled "Link Source" and contains two radio buttons: "Internal" (which is unchecked) and "External" (which is checked). The second section is labeled "Link" and contains a text input field with the value "http://www.uh.edu".

External Links offer much the same set-up choices, but require you to manually enter a web address – example shown: <http://www.uh.edu>

The CMS does not dynamically update an External Link, so if it changes, the content owner is responsible for updating it.

Illustration above shows the External Link setting and the required web address text field.

Creating Email Links

For an Email Link, select the External Link option. You may see the external Link text field has default text already there (e.g. <http://>); if so, delete that before entering the email information.

The link text field should start with "mailto:" followed by the email address, and contain no spaces and no quote marks. For example: <mailto:person@uh.edu>

Once your page is Submitted and/or Previewed in Draft, the email link will then appear on the page using the UH style of a typical link.

Creating Button-style Links

You can create a Button style link using the custom CSS styles under the Format menu. (*See: p.28*)

Formats >> Custom

More than one style will be required, so you can start by using the Insert/Edit Link dialog to apply the basic "btn" style to the link itself. Once that is applied, you will need to return to the text which carries the link by opening the HTML editor, finding that link's anchor tag, and adding additional button styles to the class statement. UH buttons are based on Bootstrap, and you can find a full UH Bootstrap reference on the UH Marketing website:

<http://www.uh.edu/marketing/web/bootstrap/components/buttons/>

Some Notes about Download links and UH Best Practices

UH Web Best Practices advise that if your site employs downloads and/or various types of media, you must make available to your site visitors whatever they may need to access your materials (e.g. Adobe Reader, for PDF files) and especially if it may not be universally available. For questions, please contact either webmarketing@uh.edu or webservices@uh.edu.

Contrasting & Defining Internal vs. External Links

An Internal Link is a dynamically tracked association between two assets within a site, created by using a *Chooser* from one of the CMS editing dialogs.

Internal Links will be translated into actual web addresses in the page's source code once the CMS creates the actual PHP webpage - which only happens during a publishing step, when a static web page file is actually created and written to a server location. Prior to publishing, CMS page type assets are basically comprised of a collection of dynamic instructions to the CMS on how to build that final web page file and on what will be included in its contents.

An External Link is a hyper link created by using a specific URL string to define the link, and which the CMS does not update dynamically (e.g. web address such as <http://www.uh.edu/> and which is typed into or pasted into an external link text field, as with the Insert/Edit Link dialog; or, may also be any text-string web address used elsewhere, such as a path in an included script or a manually written anchor tag in the HTML Editor, etc.).

Working With Images and Other Files

Images can be introduced into your pages in a number of different ways. For a Standard Page, you might typically either *Choose* a **Banner** or **Column image** (which are designed to display at or near the top of your page content in their designated areas – i.e. spanning the central and right hand columns, or at the top of just the right hand column, respectively); or, you can insert an image into various of the Content areas which have their own area-dedicated WYSIWYG Editor.

Another image option for a Standard Page might be including a Gallery type specialized page asset, which is built separately and then called into the page via a *Chooser* in the *Additional Content* section of the Edit panel. The Gallery type page asset will present a scrollable row of thumbnails under a main image display. Clicking the various thumbnails will load each image as the main image display. Standard pages can also accommodate a "rotating" SPIFF type page asset – in which one SPIFF of a set is randomly displayed upon page load or page refresh, so that the site visitor might see a different selection each time they visit the page.

The standard Home type page can also call in a Features Slideshow, and/or a Home SPIFFs Row, each of which are specialty pages, and each of which are dedicated to different kinds of image displays and each of which can provide links to further information for site visitors.

Inserting an Image via a WYSIWYG Editor

- 1) From the **Edit** panel for a page, find the **WYSIWYG Editor** for the page area where you want the image to appear. Most typically, this would be the editor for the main content area (e.g. the "Body Copy" editor).
- 2) In the editor window, place your cursor at the beginning of a paragraph, or on a separate line break, where you will want the image to appear.
- 3) From the **Toolbar** or **Insert** popout menu, select the **Insert/edit image icon**.

The screenshot shows the WYSIWYG editor interface for a page area titled "Body Copy". The "Insert" menu is open, and the "Image" option is highlighted with a red arrow. The "Insert/edit image" dialog box is also open, showing the "General" tab. The "Image Source" is set to "Internal", and the "Image" field has a "Choose File" button. The "Decorative" checkbox is unchecked, and the "Image description" field is empty. The "Dimensions" field is empty, and the "Constrain proportions" checkbox is checked. The "Class" field is set to "None". The "Ok" and "Cancel" buttons are at the bottom right of the dialog box. A red arrow points to the "Image" icon in the toolbar.

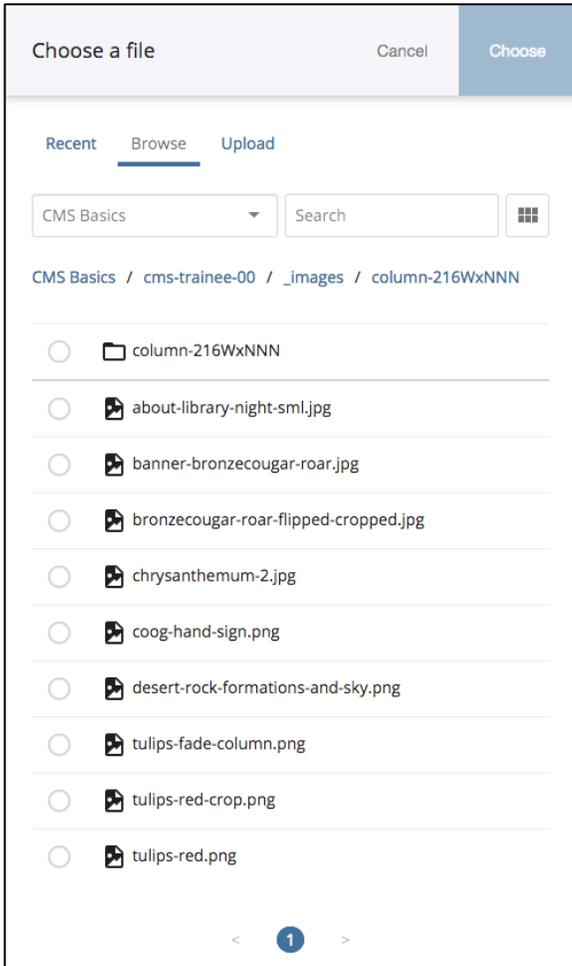
The **Insert/edit image dialog** will appear.

The default and recommended setting is for an internally sourced file.

4) Browse for the image file you want.

You will be able to choose a file which has already been uploaded into the CMS, or browse your local system to upload a new file of your choice.

Chooser browsing is basically the same process for all CMS purposes. See full discussion of *Chooser* browsing on [p.26](#). However, when *Browsing* to a graphics **File** you will have the additional option of viewing a preview in *Thumbnail mode* – making it easier to choose an image. Compare possible views in the illustrations below.



Click on the Thumbnail/List View icon to toggle the view:



Above, browsing folder contents in Thumbnail mode, with item selected.

Please also note the **File Chooser dialog Upload** option – so you can upload new Files to your site and create internal links to them, on the fly.

5) Once you have selected the item you want, click the **Choose** button to bring you back to the Insert/edit images dialog.

*TIP: If Chooser has difficulty honoring the thumbnail choice, try selecting it in thumbnail but switching back to list view to **finalize** the choice.*

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[Search](#)

CMS Basics Training custom header Display Name

UH Home > 00 Home Folder Title - CMS Basics Training > Sample Page One > Folder with Standard Page Metadata Title on setup

00 HOME FOLDER TITLE
- CMS BASICS TRAINING

- Sample Page One
- Sub Page Apple
- Sub Page Balloon
- Sub Page Character
- Folder with Standard Page Metadata Title on setup
- Sample Page Two
- Sample Page Three
- Sample Page Four
- Sample Page Five: A REDIRECT Page/Menu-Item - with some other sample assets in the same folder; and PLEASE have mercy on your site visitors and don't make any of your menu text long and wordy like THIS!
- Sample Page Six!

Standard Content Page Headline

Welcome to Page Editing!

This WYSIWYG Editor provides content for the central column area.



Sed ut perspiciatis unde omnis iste natus error sit accusantium voluptatem doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.

LINKS RELATED TO THIS SITE

GO COOGS!

[UH Web Site Home Page](#)

Sample page showing an inserted link, an inserted image with the "pull-left" style applied to it, and a right hand side Related Links set

IMPORTANT!

While the previous discussion has focused on the Content area editing options, please also observe that this sample page is still displaying the default / placeholder text for its Folder and Page Titles, and Page Display Name.

As the Content Creator, you would go back in to edit the page and change those items to reflect your site and the page's purpose and content.

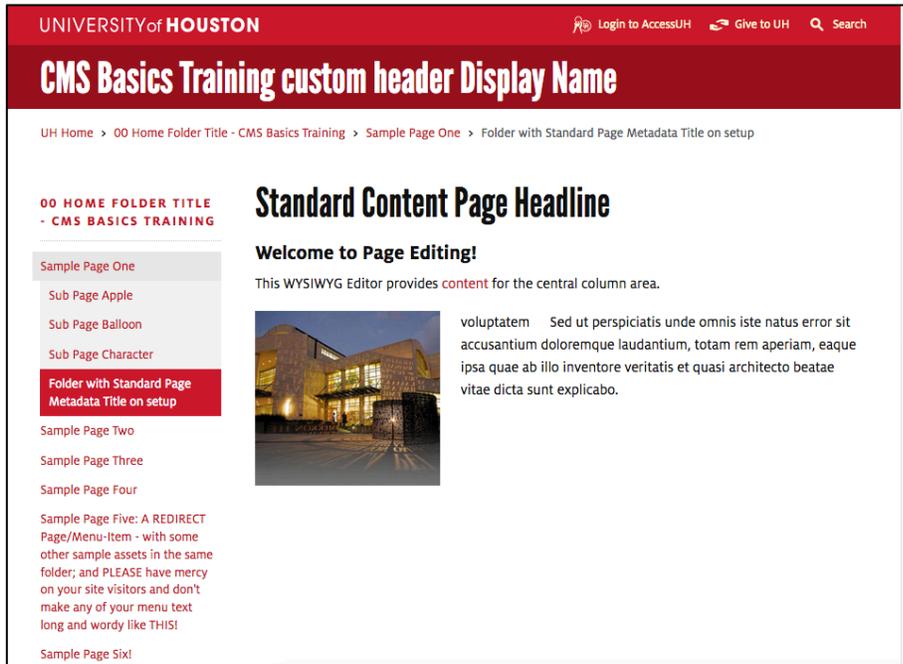
For how to do that, please see:

- Illustration of parts of a Standard Content Page type and a chart mapping out where to find discussion and instructions for editing each area: p.23.
- **'Standard Page - Editing Options and Settings'** above, p.24–25, an overview of the essential Configure, Metadata, and Content dialogs.
- Edit page >> Content dialog >> Display Name; Page Asset Title; Description

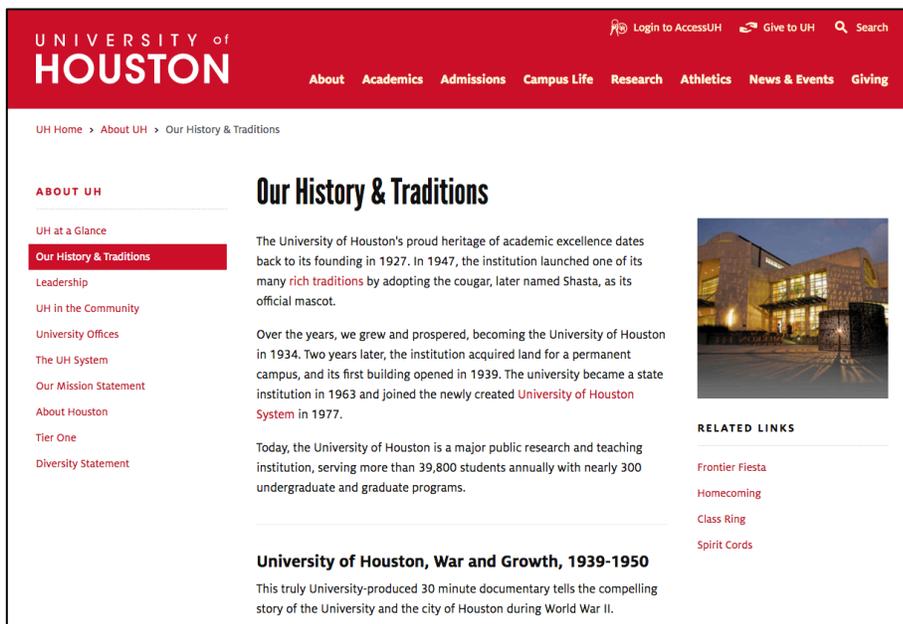
NOTE: For sites using a Custom Header – typically a "header-local" type page asset, which must be called via Chooser into the Site's or the Department's Home-type index page's Editing Panel – the site title appearing in the header can be set or changed by editing that header-local type asset.

Such custom header assets can also provide a custom navigation bar below the site title. This custom menu must be built and maintained manually however, and will not dynamically parallel site structure changes as a Left Nav menu does.

Additional Sample Pages



Note the same page content, except with the Settings section elected as "Wide" layout. Right hand column is hidden, but not deleted. Resetting the page to "Standard" layout would still display the right hand column again.



To the left, an example of a page with Standard Layout and using the same image inserted via *Chooser* as a Column Image instead of using a WYSIWYG editor. A Column Image by default appears at the top of the right hand column.

For a discussion of page types other than the Standard Content Page, please see p.22.

Discussion about the Left Navigation Menu, Breadcrumbs, URLs, CMS IDs

Left Navigation Menu – based on inheritance

Your site's interior pages will usually display some sort of on-page **left-column navigation menu**, and **breadcrumbs**.

However: the content, structure, and order of the 'Left Nav' Menu and Breadcrumb string are actually determined by the Folder Metadata from every Folder-with-a-child-page which resides within a given section, together with the material's parent-child relationships within the larger context of the Site's structure, and not through any direct editing panel of the Page itself.

The Folder/Page partnership is often spoken of as simply The Page, but remember that each piece contributes differently to your website.

The text for both that 'Left-Nav' Menu and Breadcrumb string comes from the same source: Folder Title metadata information which content editors assign. The range of pages onto which each page's links are rendered into the left nav menus is governed by that page's immediate-parent-folder's parent-folder*.

Every page inside that folder will "see" the link (i.e. site visitor would see the item included in the left nav menu). Pages outside that scope will not "see" the link.

Whenever the CMS builds a Left-hand Navigation Menu into any page, it will include all of the following items (*provided eligible items have 'Display in Menu' elected*):

- the page itself and each of the page's peers;
- any 'child' item(s) immediately subordinate to the page on display (i.e. no 'grand-children' will appear);
- the parent page of the page on display;
(note: if the page is a top-level item, this is the same as the area's home page/folder)
- each of that parent's peers, if any; and...
- each of that parent's ancestors and each of those peers.

Once assigned to be included, the CMS will dynamically update and integrate all **Left-hand Navigation Menu** and **Breadcrumb** information for you throughout your Site, and do so for you automatically whenever you change anything affecting them: 1) **Changing the text**; 2) **Removing/Adding item(s)**; or 3) **Changing the order**.
(*Note: Breadcrumb order might change if the site structure is modified. Left Nav Menu items' order can be changed manually: see Folder Contents List Order number notes, p.9, p.13.*)

You are then responsible for making sure that the Live, Published version of your site stays Synchronized with the CMS version.

Remember, it is the **Folder** information (or position) that has to have changed for them to have changed; so, basically, follow this **RULE: Publish from the *Parent to synchronize your site.**

This means you will be publishing from the **Folder** which is the parent of the **Folder** for which the information changed. And this will ensure that each and every page which "sees" any changed Left Nav items gets Published.

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 your CMS site structure – 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: admissions" becomes <http://www.uh.edu/admissions>).

When viewing a published page, this web address will show in your browser's address bar. While you are editing inside the CMS, however, it is a CMS ID for the active asset/entity which appears in your browser's address bar instead.

CMS Identifier – the asset's CMS ID

Within the CMS each page (in fact, every asset) is assigned a complex and unique identifier when it is created – and this ID stays with the asset regardless of whether it is renamed, moved, modified, sent to the trash, etc. This allows the CMS database to track editing actions dynamically for all assets. You may see an asset's CMS ID displayed in the address bar/field of your browser when the asset is selected, or you might also see the asset's CMS ID display when your cursor rolls over the asset.

Additional notes about **asset names = system names = filenames on server**

Naming and Renaming assets: system names are initially assigned during asset creation. To change an asset's system name, you would use the **Rename** dialog under the **More button**, following UH file naming conventions.

System names become Filenames upon Publishing to the server. **UH file naming conventions** state that **file names on the server** should not contain spaces or special characters (except for dashes) and should be all lower-case. Also please avoid using the underscore, as it can create visual confusion about what a web address exactly is where the address may appear in text on a page or in an email. Use whole, brief, meaningful words whenever possible. Any abbreviations should be able to be read and understood easily by your site's expected visitors.

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

AVOID these in System Names:	It is also important to avoid certain special or punctuation characters - such as the following:		
<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); 	? - question mark @ - "at" sign & - ampersand * - asterisk % - percent sign	\$ - dollar sign ! - exclamation point = - equal sign # - hatch mark () - Either open or closed parentheses, especially if they are not "paired"	\ / - either forward or back slash , - commas ; : - either colons or semi-colons ~ - tilde

With Cascade 8, the CMS provides some additional support for UH file-naming conventions by offering some automatic adjustments to some asset names (e.g. during file uploads, or during asset creation from the Add Content menu). If you see the CMS changing or suggesting a system name for your assets, it is recommended you accept the new name. Also, when naming them yourself, remember to follow the UH file naming conventions to keep your site healthy and off the website system administration's error radar.

If you find you have assets with non-compliant names in your site:

UH recommends that, if practical, you change the system names of assets which have non-compliant names.

First, consider whether the asset has previously been published. If so, the asset will need to be unpublished, renamed, and republished. If the asset has never been published, simply Rename it – see procedure following.

Before you *Rename* a previously published asset, you must consider what other items in your site may link to the changed item, and how critical it is that other sources may be linking to the affected file as well (e.g. other websites). If you know who may be linking to your materials, you may wish to communicate with them about resetting bookmarks or updating links, etc. For materials highly interlinked throughout the UH community, some server-side file management may be in order. Contact Web Technologies for more assistance in that case: webservices@uh.edu.

You should be able to see what other material in your site has **internal linking** to the item in question by checking its **Relationships**. Select the asset to be renamed, click on the **More button**, and select Relationships. If other assets in your site link internally to the asset, you should see that information there. It will also show you a way to publish all *Related* items at once. Be sure all items are in a state of readiness for publishing before you do this.

To change the system name in the CMS, first select the asset and then click on the **More button**. Select **Rename** and complete the *Rename dialog*, giving it a new Asset Name.

The *Rename* dialog should offer to **Un-publish** the asset using its original name. If you are ready to replace the asset, go ahead and either: let the CMS unpublish it; or decline, and Unpublish it yourself separately while it still has its original undesired name. The **Un-publish** command is also located under the **More button**.

If you will not want to Un-publish the material immediately, then before *Renaming* it, make a Copy which you can use later for Un-publishing. The Copy will need to have the exact same system name and system path as the original; however, it can be temporarily Re-named something else if it needs to coexist with the original for a while.

Publish the newly Renamed asset when ready, and as appropriate to your site's needs.

Publishing – The CMS Publisher Function

Simply put, the CMS Publisher has 2 basic jobs:

- 1) assemble your assets into their final form (web page or file); *and*
- 2) either write them to, or erase them from, one or more of your site's server location(s).

Until an asset is published, no one outside the CMS can see it. **'Submit'** saves your changes. **'Publish'** writes a web page or file resource to a server location, which material is then available for browsers to find and display.

The information above this section has centered so far around the CMS **Editing** process. In this section the **Staging => Live Publishing process** is explored.

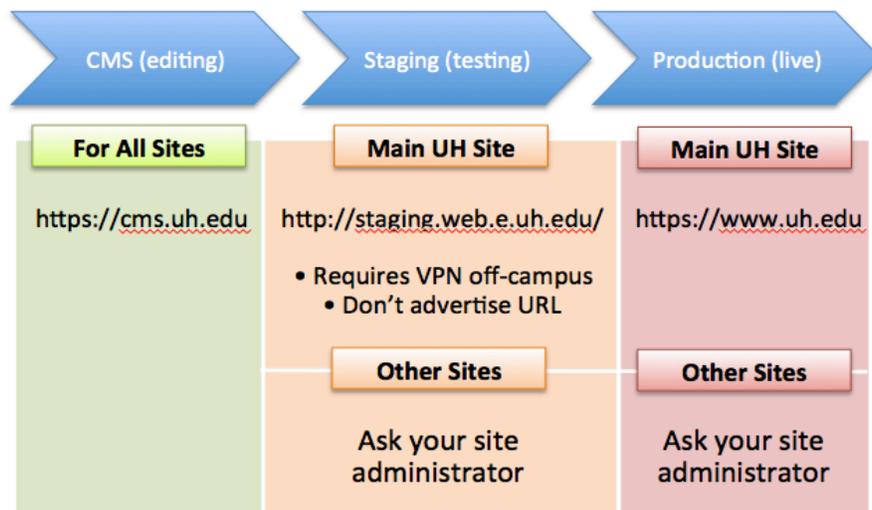
Please note here that Publishing permissions are dependent on a User's access level. Users without Publishing permissions will not see either Publishing or Unpublishing options in their interface.

Approaching the Publish step:

At the individual content development level, you will need to ensure all your edits are locked in by making sure they have been **Submitted** to their respective assets. **Remember: Drafts can not publish**, so if you want *Drafted* updates to Publish, you must first **Submit the Draft to make it the active asset**. Next, check the Preview. Changes which are not apparent in Preview mode may not be captured in the final published material. When you are happy with the page, then you are first-finish ready. You are ready to move to the Publishing process.

UH Best Practices suggest that for the safety of both the users and the website itself, users should make a habit of following these 3 steps:

- 1) Develop materials in CMS; 2) Publish *first* to Staging for testing, review, correction; 3) Go Live.



STAGING PUBLISHING

The Staging and Testing server Destinations are areas which search engines have been instructed to not crawl. This provides a safety net – a safe destination where you can preview your content via an exclusive web address, where your materials reside in a server environment virtually identical to that of the Live site.

Thus, by Publishing first to your site's **Staging or Testing destination[s]** you can easily judge whether or not you need to make any adjustments before your material is published out to the **Live destination** (aka the Production destination).

Note: If your site is on the UH servers, you can usually find your Staging pages by appending your Site's home folder name to the stem Staging address: e.g <http://staging.web.e.uh.edu/yourarea>

For sites on other servers, you will need to ask your site's server administrator for any staging / testing URL.

IMPORTANT: The Staging/Testing arena is a UH-internal-only location and you are required to be either using the UH network on-campus, or using **UH-VPN** if off site, to view this area. To acquire **UHVPN**, please see: <http://www.uh.edu/infotech/downloads/>

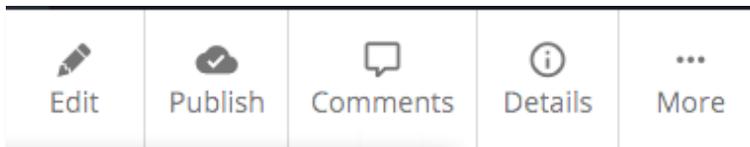
Please do not share your "hidden" URL(s) with the public:

The staging address can be shared with any individuals who have a business interest in developing the site materials. However, the address should never be published as a link in a live webpage, as that defeats the purpose of having a non-searched area. Remember, the Staging/Test version of your site is your chance to catch and fix any errors, or make any needed corrections, *before* the content is available to the public.

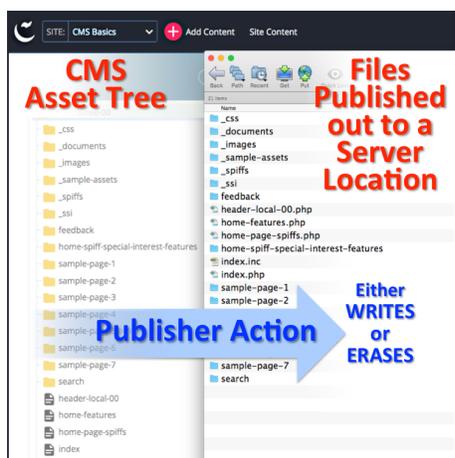
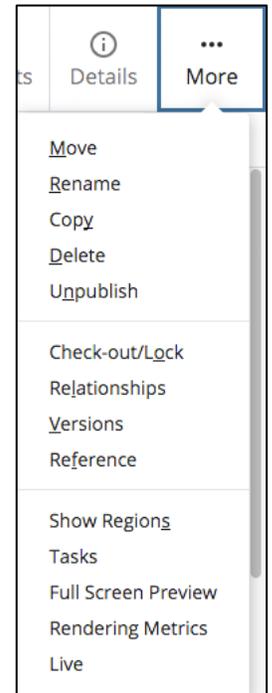
Publishing / Unpublishing

Both the Publishing and Unpublishing processes involve activating the CMS **Publisher**. The Publish command writes files to the server; and the Unpublish command erases files from the server. Note that **Publish** and **Unpublish** commands are each found in separate locations, even though they both activate the **Publisher functionality**.

Publish can be seen as one of a User's action/information buttons:



Click on the **More button** to find the **Unpublish** command.



Remember – you Publish your materials so that your site visitors' browsers can find your webpages as **static** files residing on a server location. Published materials represent the state of the **dynamic** CMS assets at the exact moment of publishing, but they are **static**; and, on a server, static materials can only be 'updated' by being **overwritten** by materials with the same names and locations as the originals.

Shown above, the More button for a page-type asset. To see other assets' More button options, see p. 19.

STEPS FOR PUBLISHING

Whether you are publishing to the **Staging area (which includes Testing)** or **Production area (aka Live)** 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 materials. **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 button**. A **Publish dialog** will appear. See illustration following. 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 see only Staging (and/or Testing) destination(s).

Publish folder
CMS Basics: /cms-trainee-00
Cancel **Submit**

Generate a publish report

Select one or more destinations to publish to:

	Destination
<input checked="" type="checkbox"/>	Production
<input checked="" type="checkbox"/>	Staging
<input checked="" type="checkbox"/>	Testing

Publish Summary
You will be publishing to destination(s) **Shared/Production, Shared/Staging, Shared/Testing.**

An Unpublish dialog is virtually identical, except the Unpublish process is signaled in the header:

Unpublish folder
CMS Basics: /cms-trainee-00
Cancel **Submit**

- IMPORTANT:** Make sure 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.

Remember best practices – you should be publishing first to Staging / Testing before going Live.

- Recognize that by default the CMS will provide a publish report for you. The report will appear in your Notifications widget. A publish report is instructive and can be helpful, but is not required. Uncheck this option if you wish.
- Click “Submit”.
- Your request now goes into a queue. [see Stack Menu >> Publish 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. The CMS will offer you a link to the Queue upon Submit the Publish/Unpublish request.

SITE:

CMS Basics

+
Add Content
Site Content
Manage Site

My Content
Search

P
v

☰

Publish Queue
View Scheduled Publish Jobs

Name	Who	Added	Started	% Done
cms-trainee-00	plschwcr	a few seconds ago	a few seconds ago	51%

Note: often, by the time you open the Publishing Queue, small amounts of material may have already finished publishing.

Note: The Queue is also available under the Stack menu – but will only appear when you are "inside" a Site. For example, you would not see it if you were "outside" your Site Content area due to visiting your My Content area, or Dashboard.

Once the material has cleared the Publishing Queue, you should then be able to go and look at it on the Server, via a Browser of your choice.

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. Always review your materials on the Live / 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.

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-type 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 static webpage file. By contrast, File-type asset system names should always include the appropriate file extensions, even while stored inside the CMS. Publisher does not alter their filenames.

“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 (Destinations). Whichever location[s] you choose (e.g. Staging or LIVE) basically determines whether the page will be seen only by content reviewers/editors, or by the general public. To the CMS, however, the process is basically the same either way: a file is written to a server location.

Similarly, when the CMS is asked to “Un-Publish” a file, it tells its Publisher to locate a filename on the server which corresponds to the system name and system path (asset tree location) of an asset in the CMS, then it deletes/erases the corresponding static 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 a Delete command (e.g. under the "More" button). And remember, upper and lower case matters! The same filename spelling with different capitalizations may publish as 2 different items – and the server may be unable to decide between them when the material is requested by a Browser, resulting in an error. (If you see such an error, please contact WebTech.)

Please remember, 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, obsolete links, or bookmarks, to serve up outdated materials to your site visitors.

It is easiest to Avoid Orphaned Files, so please: Remember the need for UN-PUBLISHING when Moving, Renaming, or Deleting Any Publishable Assets In The CMS !

Additional Misc. Notes:

Other Asset Types



Block

Blocks: You may see in various places that a Content Editing area includes CMS *Choosers* designed to accept "Blocks". For CMS editors, **Block assets** are generally the XHTML type: basically a stand-alone WYSIWYG/HTML editor dedicated to a particular use. Generally, they hold some sort of textual information such as contact information for a department, or strings of code such as a PHP 'include'. By using a Block, you will only have to update its content from the one location, and the CMS will automatically disseminate the update to all the places within the CMS where the Block has been *Chosen*. Then, simply review the Block's Relationships (under the More button) to see which material would then need to be Published (or Re-published). The Block itself usually does not need to Publish, as it dynamically serves out its information to the subscribing page[s] via the Internal Link[s] that calls it. By contrast, other types of internally linked content *does* need to Publish separately from the Page – e.g. Custom Headers; a Gallery of images; SPIFFs, Content area images; or any Files which site visitors will ultimately download via hyper-links.

FYI: *Much of the CMS' underlying dynamic structure is built using similar XML-type block structures.*



External Link

External Links, aka *Reusable Links* are a type of asset that allow you to establish an internal, dynamically tracked link to a CMS Asset which holds a single **external** web address. The same External Link could be referenced in multiple places throughout your site, but only require you to update it in one place if you need to change it. If updated, then find this asset's Relationships under the More tab to review/publish all participating pages (contingent on user permissions for the related content).

Save your Edits – Review your Drafts

When finished editing your content, don't forget to click "Submit" (or "Update" or "OK" or whatever it asks for) ! Remember that every dialog or editor the CMS opens up needs a specific confirmation to save your changes as you expect them to be saved. To discard changes you do not want, you can click "Continue" to leave a dialog panel. Alternately, you may simply navigate away from the asset; however the CMS may still retain a **Draft**. **Draft** versions of publishable assets are retained only for the User who created them, so that User has complete discretion over retaining, Submitting, or Deleting them. See your *My Content* area (or Dashboard Widget) to review your **Drafts**.

Unpacking an archive / .zip file created on a Mac

Upload and unpack .zip files via the File asset factory. 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.

Versioning notes – can 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**.

Relationships dialog – (**More button >> Relationships**) gives you information about which other assets may also need to be re-published when the asset you're working on changes; can give you the option to publish all Related items at-one-time. **! Important:** *Always contingent on what assets you have permissions for. Also, editor is responsible for reviewing and knowing whether all items listed are all ready for publishing.*

WYSIWYG / HTML Editors and the CMS' code tidy function – all user added code (e.g. PHP script) should be protected as in one of the following examples (**bold green text**) or risk being altered by the CMS code tidy function:

```
<!--#START-CODE<{?php include('...')}?>#END-CODE-->
<!--#passthrough...put any code here...#passthrough-->
```

New with Cascade 8 – Regions Display on Page Preview Rollover

With Cascade version 8, site editors are now able to see the boundaries of each page's underlying "regions" structure by rolling over the various parts of the page with your cursor. As you work with various types of pages, you may begin to see that different page types have different "regions" and thus a different underlying structure. A Home page-type asset may have different regions from a Feature Slideshow page-type asset, for example.

You may also notice that the region holding the standard content page's Display Name is called "Page Title"

– however, to the CMS this is not the same thing structurally as the *Page Asset's Title*, which is actually considered to be part of each asset's "Metadata Set". (*see also discussion on p.25 - walk through of page's content editing dialogs*)

MISC - Troubleshooting

Getting rid of orphaned files:

Orphaned files are materials previously published, especially to a live site, for which the CMS can no longer find its analog asset in the site's asset tree. 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). System name[s] and path must match **exactly** to what was orphaned; other asset content is irrelevant to the Publisher. Remember to clear out any unneeded, recreated folders/files from within the CMS after you have used them to Unpublish the unwanted file(s)!

Finding an Asset:

The **My Content widget** and Cascade Menu Bar **My Content button** offer users a list of their *Recently* visited assets. The **Search** feature, also in the Cascade Menu Bar (along with its embedded **Advanced Search**) allows users to search for an asset's: metadata, system name, location path, selected content information, and more. Search results reflect only what the user has permissions for.

Retrieving a Deleted Asset:

If an asset has been deleted from within the CMS and you want it back, look first in the Trash Can (formerly, the Recycle Bin) available from the top of the Site Content panel when you are inside a Site. The default retention span is 15 Days.

Retrieving Edits which were not formally Submitted; Drafts:

The CMS may have automatically saved your edits: both periodically, and if specifically instructed to do so. Drafts can only be viewed by the individual User for whom they were created. Go to the My Content area to find and continue working with any existing Draft versions you may have stored. Click on the item name from the list to continue editing it. Draft versions can be activated as the active asset, overriding whatever version was previously active, which then itself becomes a 'Version'.

Retrieving a previous Version of a Page:

With a Page or File selected, look under the "**More**" button and you should see a **Versions** option. Within Versions, you may select a previous version of an asset and reactivate it as the working Version. Only a limited number of the most recent Versions are retained. You may delete unwanted Versions to make more room for additional Versions.

SOME KNOWN ISSUES

- **Some left-navigation menus** have displayed certain items which previously were not set to *Display in Menu*. **FIX:** switch off any offending Folder's **Include In Menu** setting. **Folder: Edit folder >> Properties dialog**
- **Unpublish While...** (Renaming, Moving, Deleting) which was not working correctly in v.8.3 should be working now as of v.8.4. Unpublish can still be done as a separate step, as needed: More button >> Unpublish.
- **Unexpected placement after choosing** – check carefully whether assets have been placed where expected when moving or copying, especially if moving between sites. Chooser may show a choice the CMS background processes are delayed in honoring, or user selection may not have been completely finalized by checking the final selection's radio button and Submitting.
- **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. **FIX:** Correct the HTML code to be well-formed.
- **XML error preventing Submit** – proprietary Microsoft encoding detected in WYSIWYG editors. [e.g. 'Invalid XML: The prefix "o" for element "o:p" is not bound']. **FIX:** Either: Remove these tags via the embedded HTML editor; use WYSIWYG *Paste as Text* setting; or paste first into Notepad, then copy from Notepad into CMS.
- **Other unexpected results** – please contact us so we can troubleshoot and/or report them to Hannon Hill.

Cascade changes v.8.n and beyond ...

If you need help seeing how something works, or if you find something which is not working correctly, please contact us: cms@uh.edu; or webmarketing@uh.edu; or webservices@uh.edu

Please also see, for additional Known Issues notes, and chart of v.7 vs v.8 features:

<http://www.uh.edu/infotech/services/web-services/cms/cms-how-tos/where-did-they-hide-it/index.php>

NOTES:
