UW WEB CONTENT MANAGEMENT SYSTEM (CASCADE SERVER) – INTRODUCTION (LEVEL 1) –

Information Technology

Updated August 2017

Presented By:
UW Institutional Marketing and IT Client Support Services
University of Wyoming
# UW CONTENT MANAGEMENT SYSTEM

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RECOMMENDATIONS/NOTES

- The Content Management System (CMS) is compatible with both Windows PC and Mac computers.
- Firefox is the recommended browser for site editing. (Internet Explorer will cause issues during editing.)
- HELP!!! CMS questions or issues can be directed to the UWIT Service Center:
  - http://uwit.uwyo.edu
  - Send an email to: userhelp@uwyo.edu
  - Call 766-4357 (766-HELP)

ADDITIONAL RESOURCES

CMS Help and Support page: http://www.uwyo.edu/web/

- Knowledge Base (contains many how-to articles)
- Manuals and Training Support (contains training information as well as important CMS guides)
- Website Style Guide (template overviews)
- American with Disabilities Act (ADA) Guidelines
- Search Engine Optimization (SEO) assistance
- Photo Database: https://www.uwyo.edu/uprphotos/ (login is required)

LOG INTO THE CASCADE SYSTEM

- **On Campus:** https://cascade.uwyo.edu/login.act (or use the CMS Login option from http://www.uwyo.edu/web/)

- **Off Campus:** connect to the UW network using the Pulse Secure VPN (instructions for installing and using Pulse Secure are available from the UWIT Service Center knowledge base)
  - Once connected through the VPN tunnel, access CMS using the standard method above
OVERVIEW OF CMS INTERFACE

1. **Site Dropdown** – use this to select the site you want to edit
2. **Main Menu bar** – contains the tools to create and edit pages, files, and folders
3. **Side Bar/Site Tree** – this area shows all objects (pages, folders and files) in a site (+/− symbols can be used to expand/collapse folders)
4. **Account Links** – shows username, settings, and the log out button
   a. *Make sure to log out at the end of the work session.* If the browser is simply closed, the user is still logged on. If the user does not log out, it creates a security issue (if on a shared machine) and maintenance issue (in case the systems group needs to reboot the server, etc.)
   b. *A user will be automatically logged out after 60 minutes of inactivity.*
5. **Work Area** – the work area displays the dashboard and the input fields used to edit all assets
6. **History** – shows recent files the user worked on
7. **Messages** – displays all publish logs in the CMS, these can be sent to userhelp@uwyo.edu if an issue occurs
8. **Stale Content** – shows all content that has not been updated within the last 60 days
9. **Drafts** – lists saved versions of the web pages that have not been published or submitted on the edit screen

NAVIGATE TO YOUR SITE

- For training, we will use the training sites assigned by the instructor.
- In the dropdown menu select the site that you want to edit. Select the train site (your train account number may differ).
CREATE NEW FOLDERS

- In CMS, folders serve two purposes. They act as a way to organize content, and when indexed, they create the links that you see in the navigation pane of your pages. (More on this later.)

- In the main menu bar, click **New > Default > Folder**

- The work area will populate with the **SYSTEM fields** shown below.

(1) **System Name** is what the URL path will be.
   - Following the naming rules is very important!

(2) Select the **parent folder**
   - [/] indicates that the file will be created under the base folder
   - The parent folder is the folder the new asset will appear under. For instance, if you wanted to create an images folder inside the _files folder, you would select _files as the parent folder.

(3) **Include when publishing** should generally remain enabled. (Unchecking this setting will keep the asset from being copied into the live web environment.)

(4) **Include when indexing** should be checked for folders that you want to appear in the navigation area of the web page. (If a folder should not be shown in the navigation area, uncheck this setting.)
   - **This setting should NOT be adjusted for pages!**

**SYSTEM NAME RULES**

- Applies to folders, files, & pages!

1) Do not use spaces in the name
2) Do not use capitalized letters in the name
Switching to **METADATA** fields allows for a different **Display Name** to be entered. For indexed content, the Display Name will be shown in the navigation area in place of the System Name. (The Display Name can contain spaces and caps.)

**Objects can have two names!**

**SYSTEM NAME** (name within the CMS system; specific rules)

**DISPLAY NAME** (displayed on the navigation page; “user friendly name”)

**WORKSHOP EXERCISE: FOLDERS**

In the training CMS site, build the following folders (the end result should look like the image to the right):

- **_files**
  - System name: _files
  - Parent folder: [/]
  - Index? No

- **docs**
  - System name: docs
  - Parent folder: _files

- **images**
  - System name: images
  - Parent folder: _files

- **teaching-research**
  - System name: teaching-research
  - Display name: Teaching and Research
  - Parent folder: [/]
  - Index? Yes
UPLOAD FILES

Special notes:

- Files that will be used by your site, including images and documents, need to be uploaded into CMS.
- The best practice is to store files in centralized folders, such as the `_files folder` that we created in the previous section.

**IMPORTANT!!!**

Once files have been uploaded into CMS, make sure to **publish** those files before linking to them or they will not be available on your live site (see the Publishing section of this guide)

<table>
<thead>
<tr>
<th>SUPPORTED FILE TYPES</th>
<th>FILE NAME RULES</th>
</tr>
</thead>
<tbody>
<tr>
<td>.PDF, .DOCX (.DOC) for documents</td>
<td>• No spaces</td>
</tr>
<tr>
<td>.JPG, .GIF, .PNG for images</td>
<td>• No capitalized letters</td>
</tr>
<tr>
<td>Other file types will not open in a browser</td>
<td>• Extension (.jpg) should also follow these rules</td>
</tr>
<tr>
<td></td>
<td>• Files can be renamed before uploading or within the CMS system</td>
</tr>
</tbody>
</table>

**UPLOAD INDIVIDUAL FILES**

1. Click on the destination folder in CMS

2. Select **New > Default > File** to open the file upload window

3. Click **Choose File** and locate the file that you want to upload from your machine
4. Select the file that you want to upload, and click **open**

5. Change the **Parent Folder** if necessary

6. Click **Submit** to complete the upload process

---

**WORKSHOP EXERCISE: FILES (PART 1)**

In the training CMS site, upload the following files into the `_files/docs` folder (the end result should look like the image to the right):

- sample-document.docx
- sample-document.pdf

---

**UPLOAD MULTIPLE FILES**

The quickest way to upload multiple files is to create and upload a compressed (zipped) folder.

1. On your computer, browse to the location of your documents/pictures. **Select multiple files** (hold the `Ctrl` key on your keyboard and click the files that you would like to upload).

2. Right-click on one of the images you’ve selected, and select **Send to > Compressed (zipped) folder**. A folder similar to the one seen below will be created:

![Compressed folder](image)

3. Click on the destination folder in CMS

4. Select **Tools > Zip Archive**

![Zip Archive](image)

5. Click **Choose File** and locate the zipped file that you want to upload from your machine

6. Select the zipped file that you want to upload, and click **open**

7. Change the **Placement Folder** if necessary
8. Click **Submit** to complete the process of uploading and unpacking the collection of files

9. Successfully unpacked files will be listed, as well as any errors. Review the list to ensure that all files were successfully uploaded.

### Successfully unpacked

<table>
<thead>
<tr>
<th>File</th>
</tr>
</thead>
<tbody>
<tr>
<td>_files/images/20051215_WTM1407.jpg</td>
</tr>
<tr>
<td>_files/images/20061218_WTM_0718.jpg</td>
</tr>
<tr>
<td>_files/images/20051218_WTM_6723.jpg</td>
</tr>
<tr>
<td>_files/images/20071112_WTM_5564.jpg</td>
</tr>
<tr>
<td>_files/images/20081203_WTM03442.jpg</td>
</tr>
<tr>
<td>_files/images/20090408_TC88280.jpg</td>
</tr>
</tbody>
</table>

### Errors

### Unpack error

---

**WORKSHOP EXERCISE: FILES (PART 2)**

In the training CMS site, compress (zip) the sample image files from your computer and upload/unpack them into the _files/images folder (the folder should now contain multiple image files that can be used to build pages).

Can you find any errors in file names? Make sure to rename files that do not follow the rules!
AMERICANS WITH DISABILITIES ACT

- To learn about ADA requirements on your website, see: [http://www.uwyo.edu/web/accessibility/](http://www.uwyo.edu/web/accessibility/)
- Specific items to remember:
  - The Large Title field on your page is the starting point for assistive technology (Heading 1 style)
  - ALT Text descriptions for images are required
  - Images should not contain embedded text
  - Use the free WAVE tool to test your site's compliance

CREATE PAGES

Special notes:

- Web pages are the central part of any website and are used to display content.
- While folders can contain multiple pages, the default page for each folder will be named **index**.
- The homepage to your site will be located in the Base Folder (and will also be named index).

To create a page:

1. Click on the destination folder in CMS

2. Click **New > Default > Page**

3. Click on the **System tab**

4. The **System Name** should be **index** (all default pages will be named index; additional pages can be given different names)
5. **Content Type** is used to select the page’s content template. Click **Browse** (the magnifying glass icon) to find the appropriate template for your page.

6. On the Content Template page, select **www.uwyo.edu** from the drop-down menu to see available templates.

![Image of Content Type selection page]

7. Select the **College-Department Overview template** (this is the standard template for all pages; the College-Department Advanced template is covered in *Web CMS Level 2* training).

8. Click **Confirm** to apply the template.

9. The **Content tab** of the new page should now be visible (note that yellow stars designate required content; page submission will fail if any required content has not been completed).

10. **Inline Metadata** should be completed as follows:
   a. **Display Name** should begin with a keyword/phrase that indicates the topic of the page.
   b. Followed by “| Department Name | University of Wyoming”.
   c. The “|” symbol is called a pipe-bar, and can be used by holding shift and hitting the “\” key (located above the enter/return key on most keyboards).
   d. The Display Name will show in search engine results (each page should be unique).
   e. **Title** should be the same as the keyword/phrase used in the first part of the Display Name.

![Image of Inline Metadata section]

11. Enter **Section Titles**:
   a. **Large Title** will appear in large fonts (using the heading 1 style) at the top of the page and should identify the topic of the page.
   b. The **Small Title** will appear in smaller fonts at the top of the page and should contain the name of the parent program, department, college, or division.
ADD A MASTHEAD IMAGE

The **masthead image** is the wide image that appears at the top of the page. It must be an image that has been **sized to 2210x670 pixels**. Multiple masthead images are already available in the CMS system. It is recommended that you include a masthead image on at least your main page.

1. Expand the **Module Layout >> Masthead Image** area by clicking on the arrow

2. Select **Display? Yes**

3. Click **Browse** (the magnifying glass icon) to find the appropriate image file
   a. To use a pre-set masthead image, select **www.uwyo.edu** from the drop-down menu, then browse to **_shared-assets > images > masthead**; select the desired image then click **Confirm**
b. To use your own masthead image, ensure that your site is selected from the drop-down menu, browse to your site’s images folder, select the desired image and then click Confirm (this requires that you have previously prepared and uploaded a properly sized, high-quality, web-optimized image into your images folder).

4. In the ALT Text field, include a description of the image (the description should allow those using assistive technology to grasp important content and context of the image).

ADD CONTENT (1 COLUMN ROW)

Page content (including text, bulleted lists, images, videos, hyperlinks, or news items) is inserted into modules. These modules can be added and arranged into various layouts.

1. Expand the Module Layout >> Row area by clicking on the arrow.

2. To add your first module, expand Module Layout >> Row >> Content Selection.

3. Select the desired Content Type from the drop-down list; select 1 Column Row for the first module.

4. 1 column row modules expand across most of the page, and are populated using the CMS Content Editor tools.
5. Text is usually copied from another source and pasted into the web page. The copy function captures both text and formatting, but pasting the formatting can cause problems on your page. The best practice is to paste using the Paste as Plain Text tool.

6. **Highlight desired text in the source** > select Copy (or press CTRL+C) > **Enable Paste as Plain Text by clicking the button** > place your cursor in the content area > press CTRL+V to paste

7. Once the content has been pasted, desired **formatting** can be applied
   a. Use **heading styles** (such as Heading 1, 2, 3) to identify topic headings
   b. The text in your content should be formatted as **Paragraph style**
   c. Any bulleted lists should be re-applied in the content editor

---

**ADD HYPERLINKS**

There are four types of hyperlinks that you can create within CMS:

- Links to external pages
- Links to internal pages
- Links to documents
- Links to email addresses

1. Using the Content Editor, **highlight the text that you want to link** (you can also link images, but that will be covered elsewhere)

2. Click the **Insert/Edit Link button** in the toolbar at the top of the editor (chain link icon)
3. Edit **hyperlink settings** as follows:

   (1) Select **Internal/External** content:
   a. **Internal content** is located within the current CMS site, such as other pages that you control or documents you have uploaded
   b. **External content** is located outside of the current CMS site, such as other web pages or email addresses

   (2) Enter the appropriate **Link**:
   a. For **internal content**, use the browse button (magnifying glass) to find the specific page or document in your site
   b. For **an external web page**, copy and paste the web address/URL (be sure to include the https:// or https:// in the URL)
   c. For **an email address**, enter `mailto:username@uwyo.edu`

   ![Internal/External Link Example](image)

   (3) Select the **Target** window:
   a. **Same Window** will replace the content in the current browser window with the linked content; this should only be used for other university pages
   b. **New Window** will create a new browser window for the linked content; this should be used for external web pages, documents, and email links

   (4) The **Title** field is optional, but can be used to show a brief description of the linked content when the cursor is hovered over the link

4. Click **Insert** to create the hyperlink

5. To edit a hyperlink, place the insertion point on the linked text, then click the **Insert/Edit Link** button
**ADD IMAGES**

To insert an image using the Content Editor tools:

1. Locate the insertion point where you want the image to be placed

2. Click the **Insert/Edit Image** button (tree icon)

3. Select the desired **Image** by clicking the browse button (magnifying glass), then finding the image (located in the _files/images folder)

4. In the **Alternate Text** field, include a description of the image (the description should allow those using assistive technology to grasp important content and context of the image)

5. Adjust the **Width/Height** if needed (do not increase image dimensions or unlock the aspect ratio using this tool as it will lower the quality of the image)

6. Click the **Insert** button

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**MODEL RELEASE FORM**

- A Model Release Form must be completed by all persons who are recognizable in any image or video used in web or other marketing materials.
- Completed release forms should be kept on file by the department.
- Forms can be obtained here:
  
While some tools exist in the CMS system for editing images, it is highly recommended that a separate image editing application be used. (The UWIT Training office can recommend image editors and offers workshops on how to properly adjust photos and other graphical elements. Email computer.training@uwyo.edu for more information.)

Minor image editing can be completed within CMS:

1. Click the image you want to alter from the site tree and select **Edit**

![Image of CMS interface showing file tree and option to edit image](image1.png)

2. You will now see the options to change the dimensions of the image, rotate the image clockwise or counterclockwise, flip the image vertically or horizontally, and crop the image

![Image of CMS interface with options to adjust image](image2.png)

3. Be sure to keep the **Maintain Aspect Ratio** option engaged, so as not to warp your photo when resizing

4. Once you've made the necessary changes, select **Submit** (make sure to publish the image for the changes to be visible on the live site!)
WORKSHOP EXERCISE: BUILD A PAGE

Build a page in CMS following these criteria:

- Location: teaching-research folder
- System name: index
- Content type (template): College-Department Overview
- Inline metadata display name: Teaching and Research | College of Health Sciences | University of Wyoming
- Inline metadata title: Teaching and Research
- Small title: College of Health Sciences
- Large title: Teaching and Research
- Add a masthead image
- Add a 1 Column Row module
- Paste text from another source; apply formatting
- Add hyperlinks for an external page link, a document, and an email address
- Add an image to the page content

MANAGE PAGE CONTENT MODULES

To provide a rich, multimedia web experience, multiple modules containing various content can be added and arranged on a CMS page. Modules can contain text, multiple columns of bulleted lists, images and image sliders, videos, and more. If used correctly, modules add flexibility to page creation and modification.

TIP! Before creating a new page, or redesigning an existing page, it helps to sketch the planned page layout in a word processor or on paper.

VIEW CONTENT MODULES

1. **Display the list of current modules:** use the arrows to expand Module Layout areas (only one module exists in our current training project)
   a. Expanding Module Layout >> Row displays all parent rows
   b. Expanding Module Layout >> Row >> Content Selection displays child rows (which have been created within a parent row)

2. When module viewing or editing is complete, **collapse the module areas** by clicking on the arrows

   To reduce confusion, it is recommended to collapse all modules except for the one that is currently being edited.
EDIT CONTENT MODULES

1. **Each module row is designated by a content type** (in the image below, note that this page only has a single module row, and it is a *1 Column Row*); find the module row that you would like to edit.

2. **Expand the module** by clicking on the arrow.

![Module Layout Row](image)

3. Expanding the module row will display the content and editing tools (available tools will depend on the Content Type).

ADD CONTENT MODULES

Content modules can be added as parent rows or as child rows within a parent row. While the results can be the same, adding new parent rows is often simpler to manage.

1. **To add a new parent row module**, expand the selected Module Layout >> Row and click the green plus (see [1] in the image below) — *this will place the new row below the selected row*.

2. **To add a new child row module**, click the green plus below Module Layout >> Row >> Content Selection (see [2] in the image below).
3. Assuming that a new parent row module has been added, navigate to the new row and expand the Module Layout >> Row >> Content Selection area

4. Select a Content Type (some content types have sub-options; see the graphic below)

5. In this example, select 2 Column as the Content Type
6. Selecting the 2 Column option creates a 2 Column row section with two distinct column content areas; **for each column, select a Content Type**

![Content Selection](image)

7. In the first column, select **1 Column Row** as the Content Type

8. Using the content editor, create a **bulleted list**

9. In the second column, select **Image** as the Content Type (select an image from your CMS image files; **maximum width of 540 pixels**; images can be linked to pages or documents)

10. Click **Submit** to save and view the page content

11. Additional content modules can be added, configured, and rearranged as needed

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**Due to the responsive design of the new CMS templates, if the view window is too narrow, content may not display as expected.**

*The Web CMS Content Modules and Web CMS Advanced Content training workshops/manuals cover other many other types of content.*

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**REARRANGE CONTENT MODULES**

1. **Expand the content module** that needs to be moved

2. **Use the up or down arrow** to adjust the module's order on the page

![Module Layout](image)

3. Click **Submit** to save changes
PUBLISH CONTENT

Publishing is the act of copying content from the internal CMS system to an external environment that allows viewing the content from a web browser.

PUBLISHING

- All objects (including pages, images, and files) must be published to be viewable online.
- Any object that changes must be re-published for the changes to be viewable.
- If a change to an object affects another object, both objects must be re-published.

There are three separate environments used in the university website development process.

- The Content Management System (CMS) is where initial site design and development occurs.
- Content can be published to the WEBDEV environment so that pages can be previewed in a web browser only from computers connected to the university network.
- Content can then be published to the WWW “live” environment, making all content publicly available on the Internet.

To publish an object from CMS:

1. Hover the cursor over an object in the CMS site tree
2. Click the arrow that appears next to the object
3. Select Publish from the drop-down menu (or use the Publish tab)
4. Select the appropriate Destination (the best practice is to first publish your site to WEBDEV to test it before uploading it to the live site; once it is reviewed, publish the site again, this time to the WWW “live” site)
5. Click Submit to complete the publishing process
6. Review your site in WEBDEV by visiting http://webdev.uwyo.edu/<site-name>/folder-name> in a browser
WORKSHOP EXERCISE: PUBLISH AND REVIEW YOUR SITE

- Publish all of the files, images, and pages that you created during the workshop to the WEBDEV environment. (Tip! You can publish all of your files simultaneously by opening a folder, selecting all of the files, and then choosing the publish option.)

- Review your page by opening a browser tab and navigating to:
  - http://webdev.uwo.edu/train105/teaching-research
  - Use your site name instead of train105!

UNIVERSITY OF WYOMING PHOTO DATABASE

UW's award-winning photo services department has a wide selection of photos available to all UW personnel for use on UW websites. If you don't already have access to the database, submit a password request through the Project Request Form at:

http://www.uwyo.edu/publicrelations/marketing/project_request_form/index.html

Once you have access to the database follow these steps:

1. Login to the Photo Database at https://www.uwyo.edu/uprphotos/
2. Use the drop-down menus across the top of the screen to locate photos
3. Select the photo(s) you want, and click **Add This Photo to Cart** at the bottom of the page
4. Once you have added the photo(s) you need to your cart, click the **View Cart** link on the right side of the page
5. Complete information as requested, including intended use and the name of your department, then click **Send Photo Request**
6. You will receive an email when your photo request has been fulfilled

7. Click on the link in the email to retrieve your photos from your cart (or visit the network locations below):
   - Windows users: \\warehouse\uprphoto$\upr\users\yourusername
   - Mac users: smb://warehouse.uwyo.edu/uprphoto$/upr/users/yourusername

8. To access the folder from off-campus or if having problems accessing using a Mac, go to https://wyosecure.uwyo.edu, once logged in, paste the above folder location into the browse field in the upper right section. You will see a list of folder content, if any. You can download the images to your computer. Also click on the Bookmark Folder icon in the upper right side. This will allow you to pin the folder to your WyoSecure home page so you don’t have to paste the folder path in the Browse field in the future.