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

Information Technology

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UW CONTENT MANAGEMENT SYSTEM

Contents

Important notes .................................................................................................................................................. 3
Help and resources ........................................................................................................................................... 3
CMS (Cascade Server) access .......................................................................................................................... 3
Overview of CMS interface ............................................................................................................................ 4
Navigate to your site ....................................................................................................................................... 4
Create new folders .......................................................................................................................................... 5
    Workshop exercise: folders ......................................................................................................................... 8
Upload files ....................................................................................................................................................... 8
    Workshop exercise: files ............................................................................................................................ 10
Site accessibility .................................................................................................................................................. 10
Create pages ..................................................................................................................................................... 11
    Page settings .............................................................................................................................................. 11
    Add a masthead image ............................................................................................................................... 12
    Add content (1 Column Row) ................................................................................................................... 13
    Add hyperlinks ......................................................................................................................................... 14
    Add images ............................................................................................................................................... 15
    Add a horizontal line ................................................................................................................................. 16
    Add more content rows ............................................................................................................................ 16
    Add contact information .......................................................................................................................... 17
    Submit your page .................................................................................................................................... 17
    Workshop exercise: build a page ................................................................................................................ 17
Publish content ................................................................................................................................................ 18
    Workshop exercise: publish and review your site .................................................................................... 20
Appendix A – Understanding the CMS web address .................................................................................... 21
Appendix B – Web CMS image and text size reference ............................................................................... 22
Appendix C – Using the UWYO photo database ......................................................................................... 23
**IMPORTANT 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 is NOT compatible.)

**HELP AND RESOURCES**

**Immediate assistance:** CMS questions or issues can be directed to the UWIT Service Center.

- Open and track a service ticket online: [http://uwit.uwyo.edu](http://uwit.uwyo.edu) (go to Services > Website Design & Collaboration > Website Services)
- Through email: userhelp@uwyo.edu
- Call 766-4357 (766-HELP)

**CMS Help and Support page:** [http://www.uwyo.edu/web/](http://www.uwyo.edu/web/)

- How-to articles/knowledge base
- Manuals and Training Support (electronic copies of training manuals and workshop schedule)
- Website Style Guide (reviews available page templates)
- Accessibility and American with Disabilities Act (ADA) Guidelines
- Search Engine Optimization (SEO) assistance
- Additional support

**Photo Database:** [https://www.uwyo.edu/uprphotos/](https://www.uwyo.edu/uprphotos/) (see Appendix C for more)

**CMS (CASCADE SERVER) ACCESS**

- **Request access:** If you need access to edit a CMS-based website, see *How to gain or remove access to the CMS* ([http://www.uwyo.edu/web/kb/gain-cms-access.html](http://www.uwyo.edu/web/kb/gain-cms-access.html))

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

- **Off campus:** First, 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

Once logged in, the Cascade dashboard is available. The dashboard is comprised of widgets which can be customized to a desired view. (Dashboard customization is not covered in this manual.)

1. **Site**: use this menu to select the site you want to edit (only sites to which you have access will be available)
2. **My Content**: provides an overview of recently edited objects, drafts, etc. for all of your sites
3. **Account Information**: use this area to **sign-out** when you are finished editing
4. **Dashboard Customization**: add various widgets to your dashboard, and reset the dashboard to the default view
5. **My Sites**: a list of all sites to which you have access
6. **Notifications**: publish, error, and other notifications that can assist in tracking problems

**NAVIGATE TO YOUR SITE**

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

**IMPORTANT!** In the 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 menu of your pages. The diagram below compares a web page’s navigation menu to the background folders in CMS.

To create folders:

1. Select the location of the new asset. In this case, go to the Site Content area (left-side) and click on the base folder (your site name). *Select an asset by clicking on the right-pointing arrow.*

2. At the top of the screen, click Add Content > Default > Folder
3. Select the **Metadata area** - using the tab at the top of the new window. (see image below)

4. Verify that the **Placement Folder (or Parent Folder)** is the correct location for this asset. If it needs to be changed, click on the current listing and change to the desired location.

5. Add an appropriate folder **Title**. *The Title should be entered as you would like it to appear in navigation, using spaces and capitalized letters. The CMS will automatically create an appropriate System Name from the Title, replacing spaces with hyphens and replacing caps with lower-case letters.*

6. Switch to the **Properties area** - using the tab at the top of the new window. (see image on next page)

7. Adjust **Include when indexing**.
   - Check this box when the folder should appear in your webpage navigation area.
   - Uncheck this box when the folder should NOT appear in the navigation area.

8. Adjust **Include when publishing**.
   - Check this box to allow the folder to be published to webdev or live sites.
   - Uncheck this box to prevent the folder from being published, such as archive or development folders.

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**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
9. When editing is complete, click **Submit** (upper-right corner). Then, click **Finish (checkmark)** to complete the process.

10. The new folder should appear in the **Site Content area**.

11. Note that the Title (navigation name) and the System Name of the folder are displayed at the top of the page.

   ![Folder: Teaching and Research](image)

   **Folder: Teaching and Research**

   ![train101 / teaching-and-research](image)

To edit an existing folder:

1. Select the folder, and choose an option.

   ![Edit, Publish, Comments, More](image)

2. **Edit**: use this to change the title, indexing, and publishing settings

3. **More**: provides options to move, rename (system name), copy, delete, and unpublish the asset

4. **Always remember to Submit changes or they will not be saved!**
WORKSHOP EXERCISE: FOLDERS

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

- **_files**
  - System name: _files
  - Parent folder: base folder/site name
  - Index? No

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

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

- **teaching-research**
  - System name: teaching-and-research
  - Title: Teaching and Research
  - Parent folder: base folder/site name
  - Index? Yes

UPLOAD FILES

Any files that will be used by your site, including images and documents, need to be uploaded into the CMS.

The best practice is to store files in centralized folders, such as the _files folder that we created in the previous section.

**SUPPORTED FILE TYPES**

- .PDF, .DOCX (.DOC) for documents
- .JPG / JPEG, .GIF, .PNG, .BMP for images
- Other file types will not open in a browser.

**FILE NAME RULES**

- No spaces
- No capitalized letters
- Extension (.jpg) should also follow these rules
- Files can be renamed before uploading or within the CMS system
To upload one or more files:

1. Select the location of the new asset. In this case, go to the Site Content area (left-side) and click on the appropriate folder (such as docs). *Select an asset by clicking on the right-pointing arrow.

2. At the top of the screen, click Add Content > Default > File

3. Verify that the Placement Folder (or Parent Folder) is the correct location for this asset. If it needs to be changed, click on the current listing and change to the desired location. (see image below)

4. Choose files. Browse to or drag one of more files into the file upload area. If you upload single files, you can rename them using the File Name field. (File Names cannot have spaces or capitalized letters. *We highly recommend renaming your files prior to uploading them into the CMS.)

5. Click Save & Preview, then Submit (and Submit one more time to complete the upload process). *If you do not click Submit, the file is saved as a draft and not uploaded as a usable asset in the CMS!

**IMPORTANT!!!**
Once files have been uploaded into the 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)
WORKSHOP EXERCISE: FILES

In your CMS training site, upload the following files. The end result should look like the image to the right.

- _files/docs:
  - sample-document.docx
  - sample-document.pdf

- _files/images:
  - all image files provided by the instructor

SITE ACCESSIBILITY

An important concern when creating your website is accessibility, the capacity for all people regardless of ability to be able to engage with your site’s content.

Specific items to remember:

- **Heading Styles** should be applied to section titles (text) to create a page that is easy to navigate with assistive technology.
- Images should have **ALT text** descriptions that provide sufficient content and context to those who cannot see the images.
- Images should not contain embedded text (such as images of posters) unless that information is also provided on the site itself.
- Video content should have **closed captions** available.
- Use the **accessibility tool** provided by the university to scan new and edited pages regularly. The tool will identify issues and recommend solutions.

Visit [http://www.uwyo.edu/web/accessibility/](http://www.uwyo.edu/web/accessibility/) to learn more about section 508 requirements, tips for creating accessible content, how to use the accessibility tool, and more!
CREATE PAGES

Special notes:

- Web pages are the central part of any site and are used to display content.
- Your site's home (landing) page will be located in the base folder of your site. The page will be named index.
- While folders can contain multiple pages, the default page for every folder will be named index.

PAGE SETTINGS

1. Select the location of the new asset. In this case, go to the Site Content area (left-side) and click on the appropriate folder (such as the teaching-research folder). *Select an asset by clicking on the right-pointing arrow.

2. At the top of the screen, click Add Content > Default > Page

3. In the Choose Page Type window, switch to www.uwyo.edu to view available page templates. Select the page template for your new page, such as the standard College-Department Overview, and then click on Choose to complete the selection.

4. Add a Page Name. (Remember that in the CMS System Names must NOT contain spaces or capitalized letters.) Main pages for all folders will be named index.

5. Verify that the Placement Folder (or Parent Folder) is the correct location for this asset. If it needs to be changed, click on the current listing and change to the desired location.
6. Add a **Display Name**. The Display Name should begin with a keyword/phrase that indicates the topic of the page, followed by "| Department Name | University of Wyoming"

   ![Display Name Example](image)

   For example: Teaching and Research | College of Health Sciences | University of Wyoming

7. Add a **Title**. This is typically the keyword/phrase used in the Display Name.

8. Ensure that **Show in Navigation** is enabled. (This will never be disabled for index pages, but can be disabled for other pages in a folder if you do not want the pages to be listed in the navigation menu of a page. For example, you may not want all faculty pages to be listed in navigation, only the faculty directory.)

9. **Section Titles**: Add a **Large Title**. This field depends on the page template being used. In the standard College-Department Overview template, this will appear at the top of the page in Heading Style 1 text. (An optional **Small Title** appears below the large title on the page.)

### ADD A MASTHEAD IMAGE

The **masthead image** is the optional image that appears at the top of a page. It must be **sized to 2210 pixels** (width) and **up to 670 pixels** (height).

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

2. Select **Display? Yes**

3. Click **Choose File**
   a. To use your own masthead image: select Browse > navigate to the appropriately sized image that you have previously uploaded to the CMS
   b. To use a UWYO masthead image: select Browse > switch to www.uwyo.edu > _shared-assets folder > images > masthead
   c. Click **Choose** to complete the selection

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 rows. Rows can be added and arranged into various layouts. Types of content that can be added into rows varies depending on the selected page template. We will focus on the College-Department Overview template. (Other templates and content types are covered in the Web CMS Level 2 training materials.)

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

2. To add content to your first row, expand Module Layout > Row > Content Selection.

3. Select the desired Content Type from the drop-down list (content options for the College-Department Overview template are shown below). We will start with the 1 Column Row, which is the standard CMS content/text editor.

4. Using the 1 Column Row Content Editor tools, you can add text, lists, links, images, tables, and more.

5. Add text: Text is often 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 Text tool.

Highlight text in the source document > Copy > Edit menu of the Content Editor > Paste as text > place the insertion point in the desired spot > Ctrl-V
6. **Format text**: Once the content has been pasted, apply desired **formatting**.
   a. Use **heading styles** in a hierarchical manner to identify topic headings.
   b. The text in your content should otherwise be formatted as **Paragraph style**.
   c. Any bulleted lists should be re-applied in the content editor.

   ![Example of formatting options](image)

**ADD HYPERLINKS**

Hyperlinks can be used to direct page visitors to other web pages, documents, and specific email addresses.

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

2. Click the **Insert/Edit Link button** in the editor (chain icon).

3. **Edit hyperlink settings**.
   a. **Link Source**: **Internal content** is located within the current CMS site, such as other pages that you control or documents you have uploaded. **External content** is located outside of the current CMS site, such as other web pages or email addresses.
   b. **Link Address**: For **internal content**, browse to find the specific page or document in your site. For an **external web page**, copy and paste the web address/URL (be sure to include the http:// or https:// in the URL). For an **email address**, enter `mailto:username@uwyo.edu`.

   ![Example of hyperlink settings](image)
c. **Target:** *Same Window* will replace the content in the current browser window with the linked content. *New Window* will create a new browser tab for the linked content; this should be used for document, external web pages, and email links.

4. Click **Ok**.

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

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**ADD IMAGES**

Images are best added using other content types (rows), such as images or sliders in a 2 Column Row. To insert an image into the 1 Column Row, use Content Editor tools. (see Appendix B for size requirements)

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

2. Click the **Insert/Edit Image** button.

3. Click **Choose File** and **Browse** to the desired image (previously uploaded into the CMS). Click **Choose** to select the image.

4. Add an **Image Description (ALT Text)** that will provide those using assistive technology with sufficient information.

5. Adjust the image **Dimensions** 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 **Ok** to insert the image.

7. Once an image has been inserted, right-clicking on the image in the Content Editor will allow you to **edit the image** or add a hyperlink.
While some tools exist in the CMS system for minor image editing, we recommend the use of a separate image editing application, such as Photoshop or GIMP. (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.)

**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: [http://www.uwyo.edu/publicrelations/_files/docs/model-release.pdf](http://www.uwyo.edu/publicrelations/_files/docs/model-release.pdf)

**ADD A HORIZONTAL LINE**

Horizontal lines can be added in the 1 Column Row's Content Editor to help separate content.

1. Locate the insertion point where you want the line to be placed.
2. From the Insert menu, select **Horizontal line**.

**ADD MORE CONTENT ROWS**

Additional rows of content, such as a 2 Column Row with a video and an image slider, can be added below your current 1 Column Row. (See *Web CMS Level 2* training materials for more about content.)

**To add another content row:**

1. Go to your current row and click the **green plus**. This will add a new content row below this row.

2. A new content row will appear below. Use buttons to **rearrange rows, add rows**, and **delete rows**. Select the desired content type for this row, and start adding more content!
ADD CONTACT INFORMATION

College/Department contact information can be added, which will appear in the bottom-left corner of the web page (except if using the College-Department Advanced template, which does not display contact information on the page, but will show contact information on child pages if it is the section default).

1. **Section Default** will automatically use information from the home/landing page. **Content Below** will use information provided in the form below.

2. Add information, such as address, phone number, email address, a college/department logo, and links to your social media pages.

SUBMIT YOUR PAGE

Once sufficient information has been added, submit your page by:

1. Click on **Save & Preview** (upper-right corner).

2. **The page is saved as a draft but is NOT submitted to the CMS site until you click Submit** (located at the top of the screen). Add comments if desired, and hit Submit again.

3. To edit the page after it has been submitted, select the page from the Site Content area, and click Edit.

WORKSHOP EXERCISE: BUILD A PAGE

Build a page in CMS following these criteria:

- **Location**: teaching-and-research folder
- **System name**: index
- **Content type/template**: College-Department Overview
- **Display name**: Teaching and Research | College of Health Sciences | University of Wyoming
- **Title**: Teaching and Research
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 – IMPORTANT NOTES

- All assets (including pages 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.
- The addition of a new folder/section will affect the navigation menu of all pages, thus the new folder and all pages will need to 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 the CMS:

1. Select the asset to be published from the Site Content area, such as a recently created or edited page.

2. Click Publish (from the top of the screen.)

3. You can also open a folder, select items in the folder, and publish multiple items simultaneously.

4. Select the destination environment (WEBDEV, WWW, or both). We recommend publishing only to WEBDEV until the page is ready for WWW. (Training sites can only publish to WEBDEV.)

5. Click Submit to finish publishing.

6. Review your site in WEBDEV by visiting http://webdev.uwyo.edu/<site-name>/<folder-name> in a browser. (see Appendix A in this manual for an explanation of CMS web addresses)
WORKSHOP EXERCISE: PUBLISH AND REVIEW YOUR SITE

- Publish all of the files 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.uwyo.edu/train105/teaching-research
  - Use your site name instead of train105!
APPENDIX A – UNDERSTANDING THE CMS WEB ADDRESS

Understanding a UW Web Address (URL)

http://www.uwyo.edu/sjrc/ → Immediately following uwyo.edu, is the main site, SJRC. This opens the site’s home page (named index in CMS).

http://webdev.uwyo.edu/sjrc/ → This opens the main site’s home page from the webdev review area.

http://www.uwyo.edu/sjrc/fundingrequest/ → This navigates to the “fundingrequest” folder and opens the index page.


UW Web Address (URL) – putting it all together!

http://webdev.uwyo.edu/sjrc/fundingrequest/ →

## APPENDIX B – WEB CMS IMAGE AND TEXT SIZE REFERENCE

### Important notes:
- Image dimensions are denoted as **width x height (in pixels)**
- Specified widths are **required**; specified heights are **recommended**
- Image size requirements are subject to change!

<table>
<thead>
<tr>
<th>College-Department Overview template</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Masthead image</td>
<td>2210 x up to 670</td>
</tr>
<tr>
<td>2 Column – Image</td>
<td>690 x 690*</td>
</tr>
<tr>
<td>2 Column – Slider</td>
<td>576 x 578</td>
</tr>
<tr>
<td><em>smaller images will be shown as actual size; larger images will be downsized to fit</em></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>College-Department Advanced template</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Masthead image</td>
<td>2210 x up to 670</td>
</tr>
<tr>
<td>Background image (parallax)</td>
<td>2210 required width</td>
</tr>
<tr>
<td>4+ Image Carousel</td>
<td>576 x 578</td>
</tr>
<tr>
<td>2 Column Image with Caption</td>
<td>767 x 332</td>
</tr>
<tr>
<td>3 Column Image with Caption</td>
<td>767 x 503</td>
</tr>
<tr>
<td>2 Column Split – Image</td>
<td>690 x 360</td>
</tr>
<tr>
<td>2 Column Split – Slider</td>
<td>576 x 578</td>
</tr>
<tr>
<td>2 Column Split – Callout Image</td>
<td>690 x 690</td>
</tr>
<tr>
<td>Up to 4 Columns – Image or Slider</td>
<td>576 x 578</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Faculty Staff template</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Masthead image</td>
<td>2210 x up to 670</td>
</tr>
<tr>
<td>Faculty/staff photo</td>
<td>125 x 150</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Summary template</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Masthead image</td>
<td>2210 x up to 670</td>
</tr>
<tr>
<td>Summary photo</td>
<td>125 maximum width</td>
</tr>
</tbody>
</table>

### CMS TEXT FORMATS
- **Paragraph**
- **Heading 1**
- **Heading 2**
- **Heading 3**
- **Heading 4**
- **Heading 5**
- **Heading 6**

### CMS TEXT STYLES
- **PARAGRAPH LARGE**
- **PARAGRAPH SMALL**
- **Paragraph standard**

*These samples are for comparison only. Actual sizes on the page may vary.*
APPENDIX C – USING THE UWYO 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.

To request access, email webhelp@uwyo.edu

For more information about the database, go to: http://www.uwyo.edu/web/kb/photo-database.html

To obtain photos from the database:

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