

UW Web Content Management System (Cascade Server) – Level 1 (Introduction) –



Information Technology

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UW CONTENT MANAGEMENT SYSTEM

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Help and resources

Immediate assistance:

- For website assistance, directly contact the WebHelp Team by emailing webhelp@uwyo.edu
- For technical assistance, contact Information Technology, <https://www.uwyo.edu/infotech/>

CMS Help and Support page: <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

UW Photo Database: <https://www.uwyo.edu/uprphotos/> (see **Appendix C – Using the UWYO photo database** to learn how to gain access)

CMS (Cascade Server) access

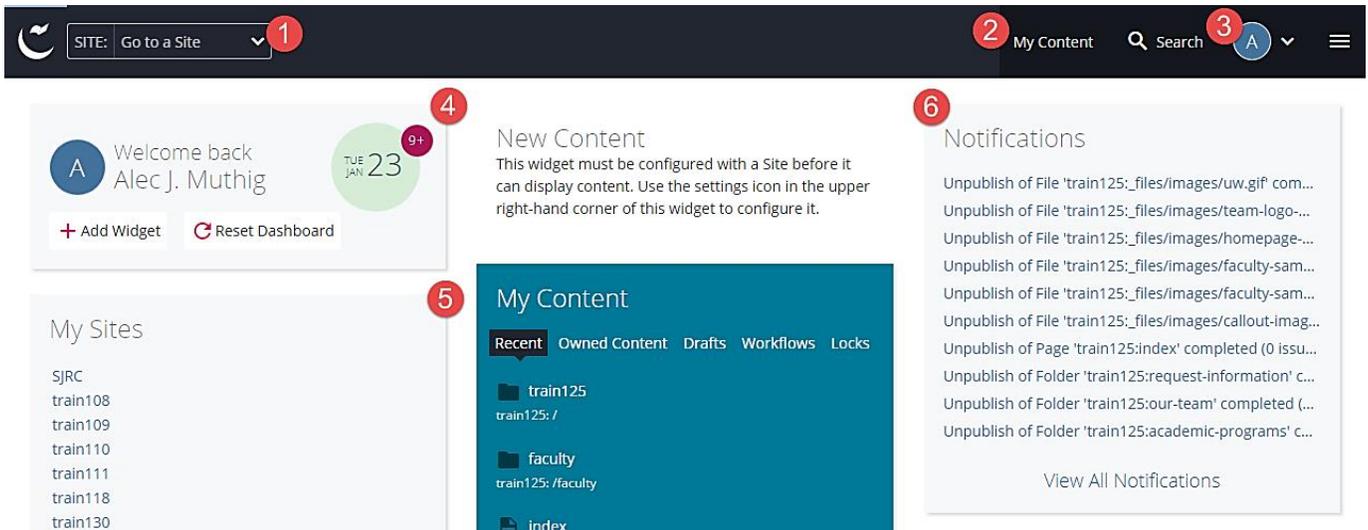
- **Request access:** If you need access to edit a CMS-based website, see *How to gain or remove access to the CMS* (<http://www.uwyo.edu/web/kb/gain-cms-access.html>)
- **On campus:** Visit <http://www.uwyo.edu/web/> and select Login to Cascade Server
- **Off campus:** First, connect to the UW network using the **Wyosecure/PulseSecure VPN** (see **Appendix D – Connecting through VPN**). Once connected through the VPN tunnel, access CMS using the standard method above.

*If you are using this manual to complete Web CMS Level 1 training, please log into the CMS training site that was provided (see the UWIT ticket or email). To request a site, go to [this form](#).



Overview of CMS interface

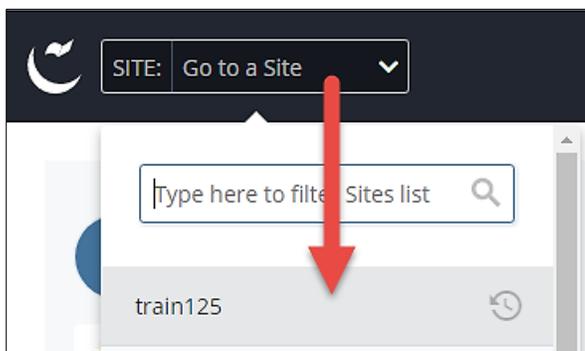
Once logged in, the Cascade dashboard is available. The dashboard is comprised of widgets which can be customized to a desired view. (Dashboard customization is not covered in this manual.)



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

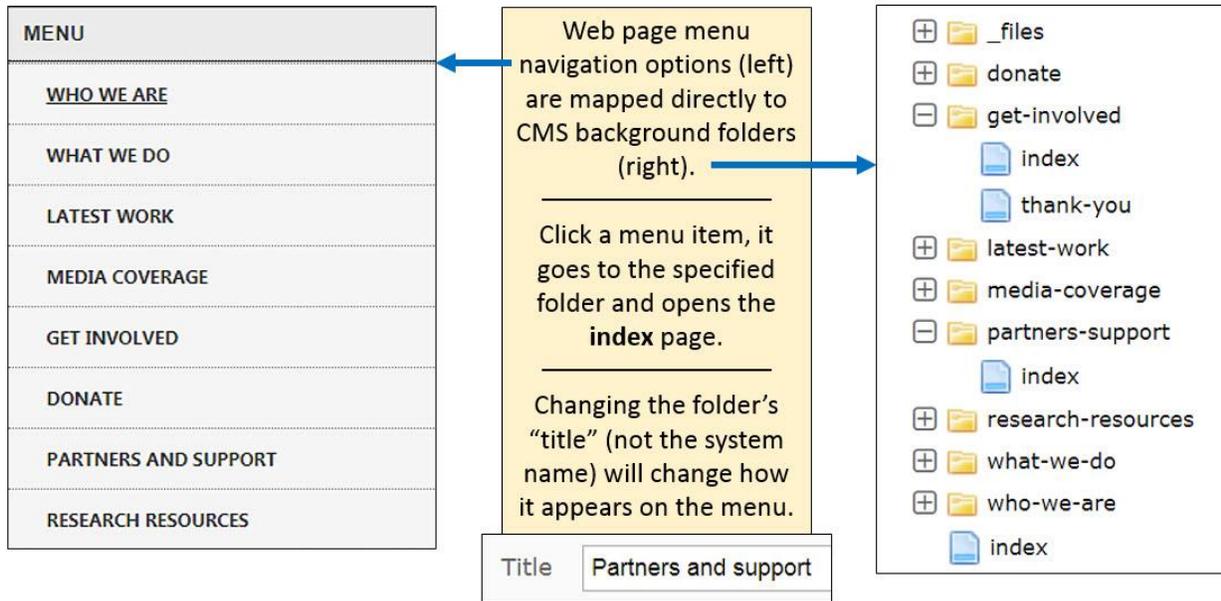
Navigate to your site

- In the site menu select the site that you want to edit. Select the assigned training site (your training account number may differ).



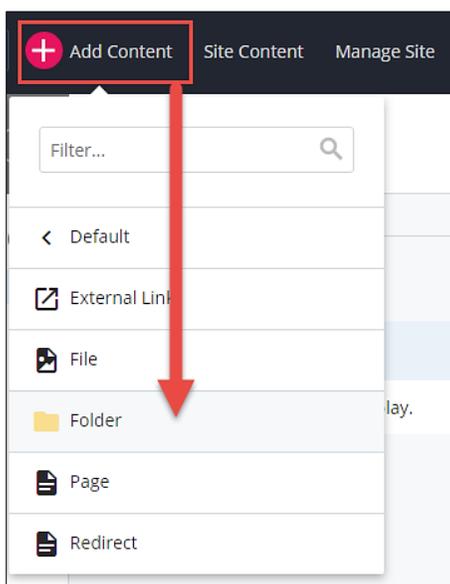
Create new folders

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.

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

Metadata Properties

Cancel Submit

Check Spelling

Placement Folder *

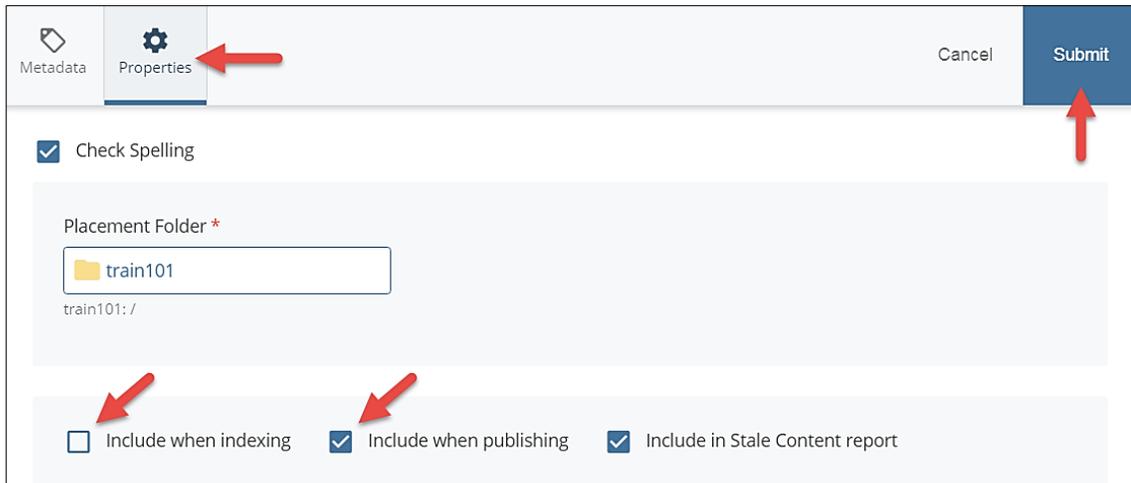
train101

train101: /

Title

Teaching and Research

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 menus.
 - Uncheck this box when the folder should NOT appear in navigation menus.
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 folders or materials that are still being developed.



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



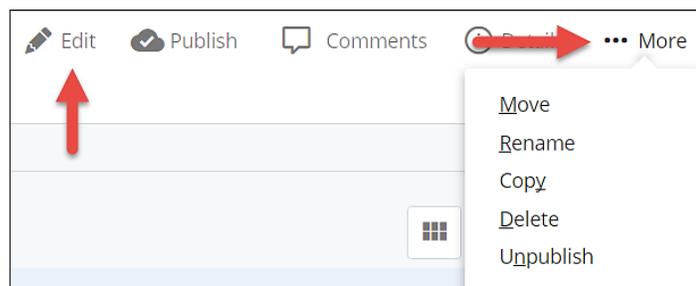
10. The new folder should appear in the **Site Content area**.

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



To edit an existing folder:

1. Select the folder and choose an option.



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

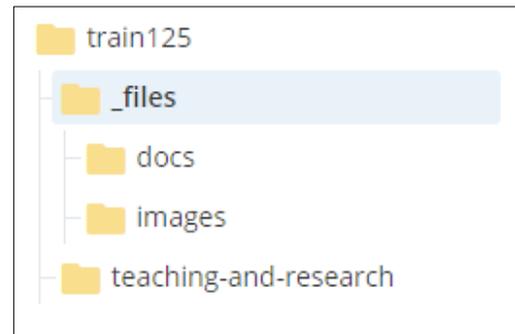
3. **More:** provides options to move, rename (system name), copy, delete, and unpublish the asset

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 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-and-research**
 - Title: Teaching and Research
 - System name: 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

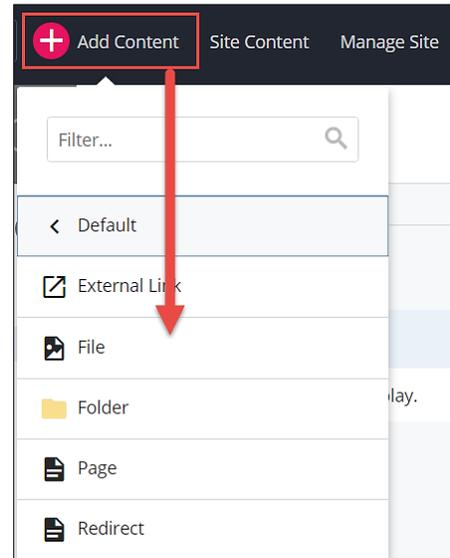
.PDF, .DOCX (.DOC) for documents

.JPG/.JPEG, .GIF, .PNG, .BMP for images

Other file types will not open in a browser.

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 or more files into the file upload area.



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!!!

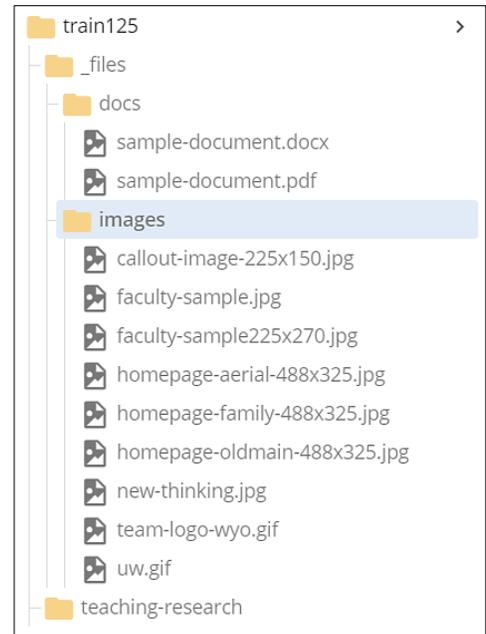
Once files have been uploaded into the CMS, make sure to **publish** those files before linking to them or they will not be available on your live site. (see the Publishing section of this guide)

6.

Workshop exercise: files

In your CMS training site, upload the following files. The 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



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.

Choose Page Type

Cancel Choose

www.uwyo.edu Search

Name ▲

College-Department Advanced

College-Department Overview

Faculty Staff

4. Add a **Page Name**. (In the CMS, page names cannot 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.

Page Name *

Must meet the following requirements: Lowercase only, Word spaces replaced with hyphen, and leading and trailing spaces are not allowed

index

Placement Folder *

teaching-research

train125: /teaching-research

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”

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

Display Name *

Teaching and Research | College of H

Title *

Teaching and Research

Show in Navigation

Yes No

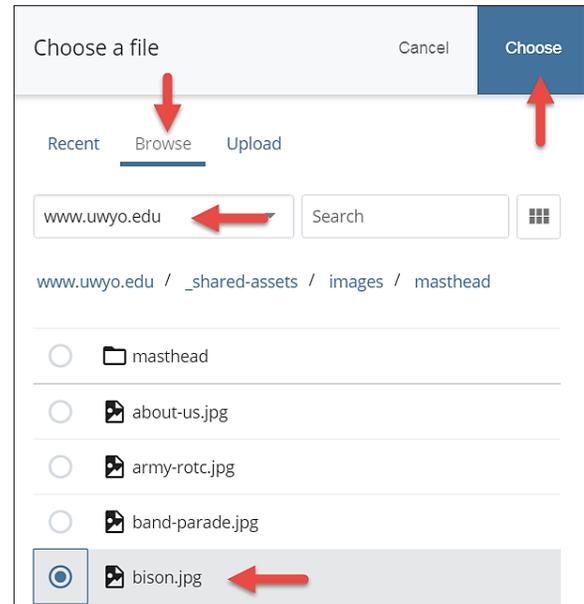
7. Add a **Title**. This is typically the keyword/phrase used in the first part of the Display Name.
8. Ensure that **Show in Navigation** is enabled. (This will never be disabled for index pages but can be disabled for other pages if you do not want the pages to be listed in the navigation menu of a 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)**.

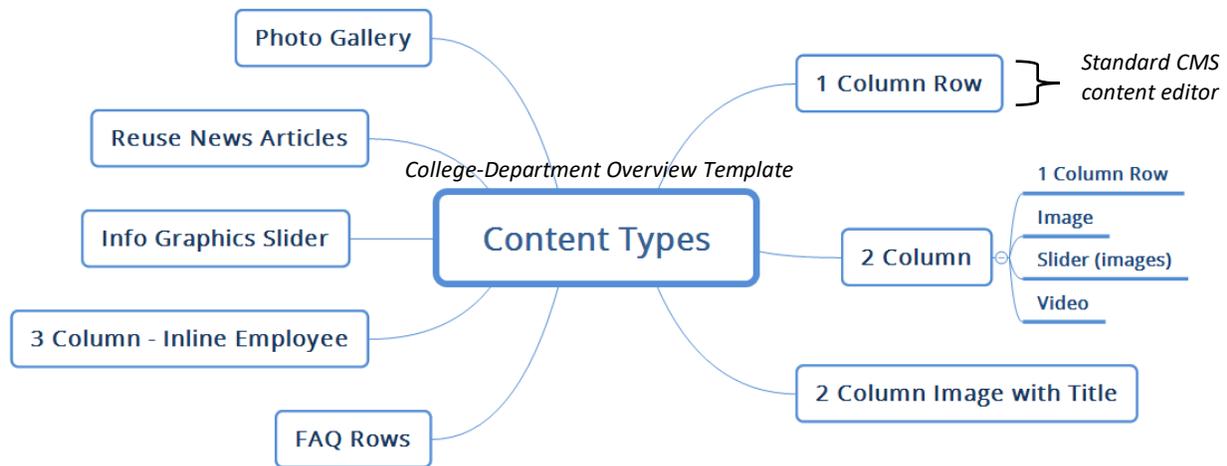
1. Expand the **Module Layout > Masthead Image** area by clicking on the arrow
2. Select **Display? Yes**
3. Click **Choose File**
 - a. **To use your own masthead image:** select Browse > navigate to the appropriately sized image that you have previously uploaded to the CMS
 - b. **To use a UWYO masthead 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 *Web CMS Level 2* training.)

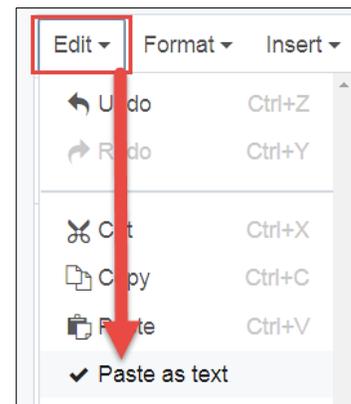
1. Expand the **Module Layout > Row** area by clicking on the arrow.
2. To add content to your first row, expand **Module Layout > Row > Content Selection**.
3. Select the desired **Content Type** from the drop-down list (content options for the College-Department Overview template are shown below). We will start with the **1 Column Row**, which is the standard CMS content/text editor. (To learn about the other content types, see the CMS Knowledge Base, <http://www.uwyo.edu/web/kb/index.html>, or email WebHelp@uwyo.edu.)



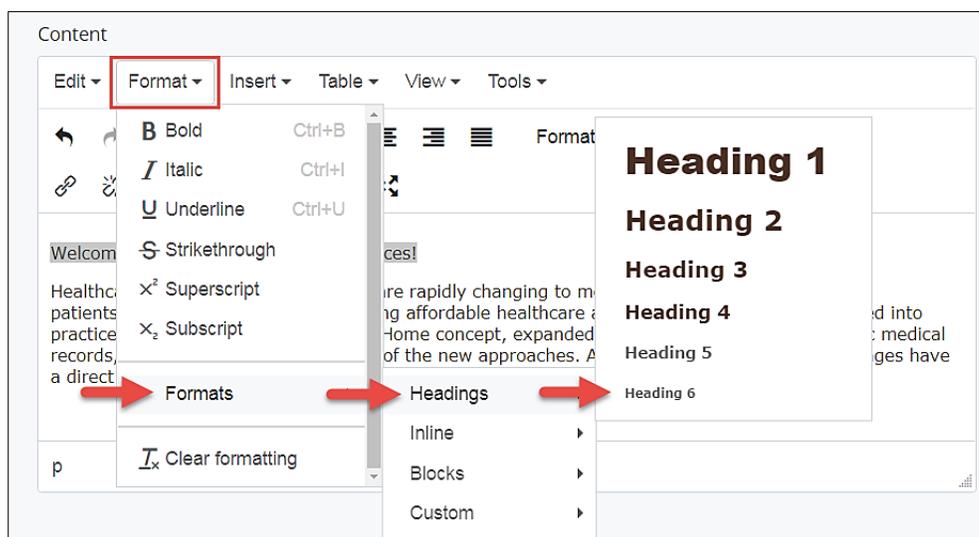
4. Using the 1 Column Row **Content Editor tools**, you can add text, lists, links, images, tables, and more.

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 > press **Ctrl-V** keys to paste



6. **Format text:** Once the content has been pasted, apply desired **formatting**.
- Use **heading styles** in a hierarchical manner to identify topic headings.
 - The text in your content should otherwise be formatted as **Paragraph style**.
 - Any bulleted lists should be re-applied in the content editor.



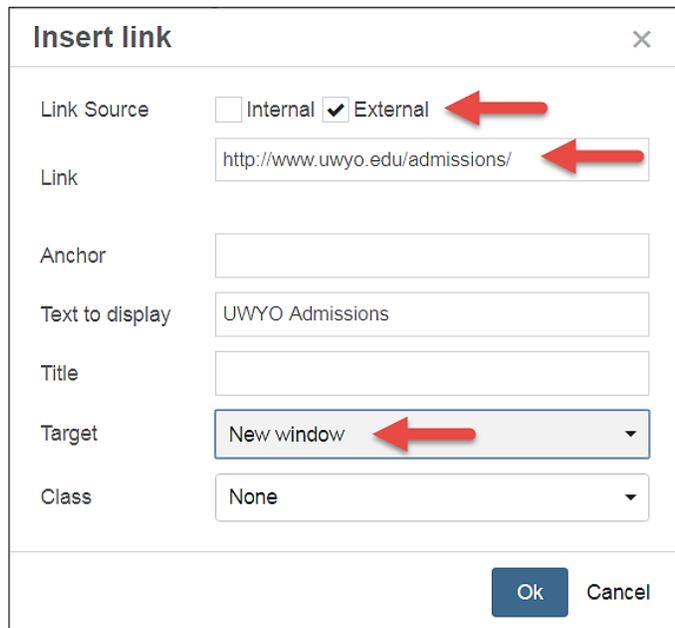
Add hyperlinks

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 from 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**.



- 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.

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 – Web CMS image size reference** for a list of image 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.

Insert/edit image

General | Advanced

Image Source Internal External

Image  →

train125: /_files/images/team-logo-wyo.gif

Decorative This is a decorative image, no description needed.

Image description →

Image's title, display name or custom text

Dimensions x Constrain proportions →

Class

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.)

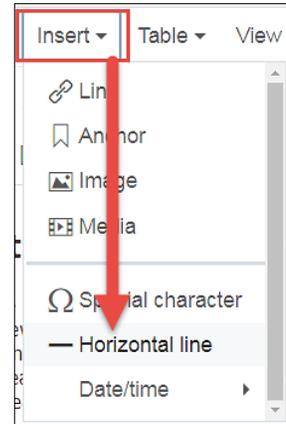
MODEL RELEASE FORM

- 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>

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**.

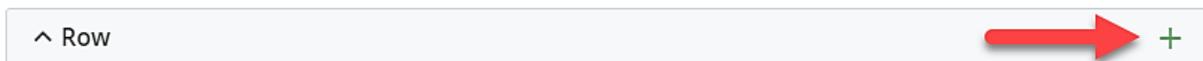


Add more content rows

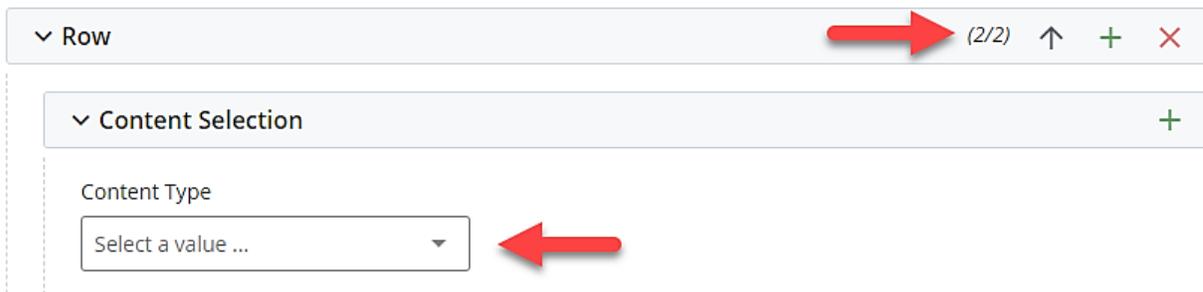
Additional rows of content, such as a 2 Column Row with a video and an image slider, can be added below your current 1 Column Row. (See *Web CMS Level 2* training for more about content.)

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.



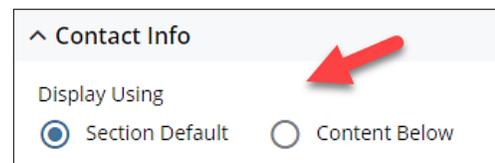
2. A new content row will appear below. Use buttons to **rearrange rows**, **add rows**, and **delete rows**. Select the desired content type for this row and start adding more content!



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).

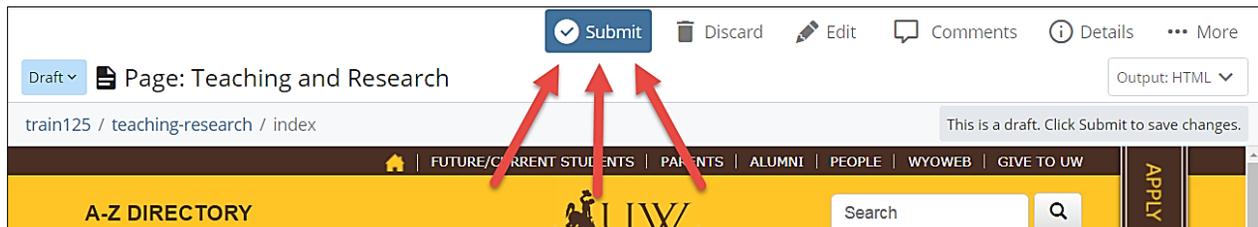
1. Section Default will automatically use information from the home/landing page. Content Below will use information provided in the form below.
2. Add information, such as address, phone number, email address, a college/department logo, and links to your social media pages.



Submit your page

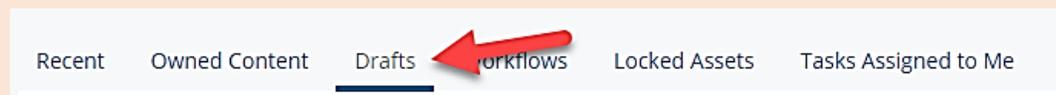
Once sufficient information has been added, submit your page by:

1. Click on **Preview Draft** (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.

Working with DRAFTS: Content that has been SAVED but NOT SUBMITTED, can be found in the DRAFTS area. Click on My Content (upper-right corner of screen), then select Drafts. Open the desired draft, continue editing, then Submit when done!



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
- Large title: Teaching and Research
- Add a masthead image
- Add a 1 Column Row module
- Paste text from another source, and apply formatting
- Add hyperlinks for an external page link, a document, and an email address
- Add a horizontal line
- Add an image to the page content
- Save and submit the page

Publish content

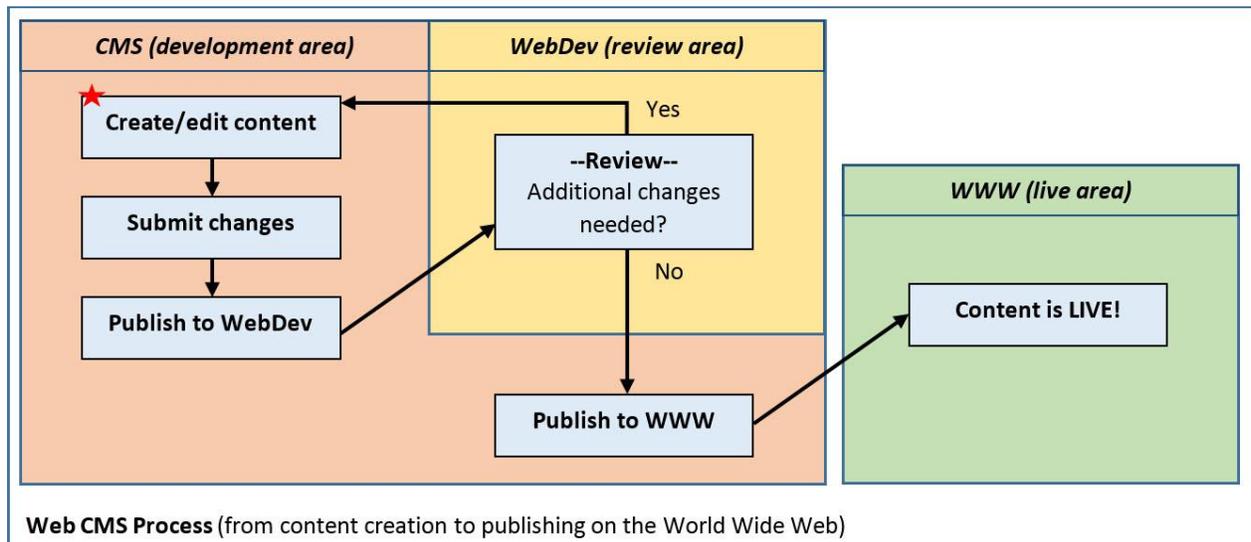
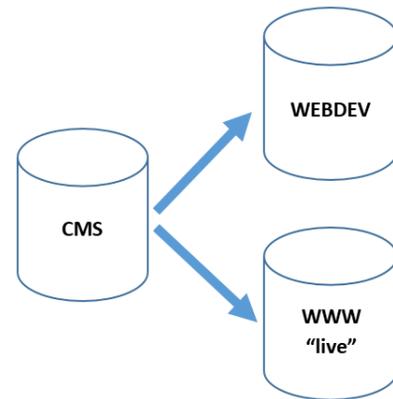
Publishing is the act of copying content from the internal CMS system to an external environment that allows viewing the content from a web browser.

PUBLISHING – 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.
- Quickest way to re-publish? Publish the entire root site folder!

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*.

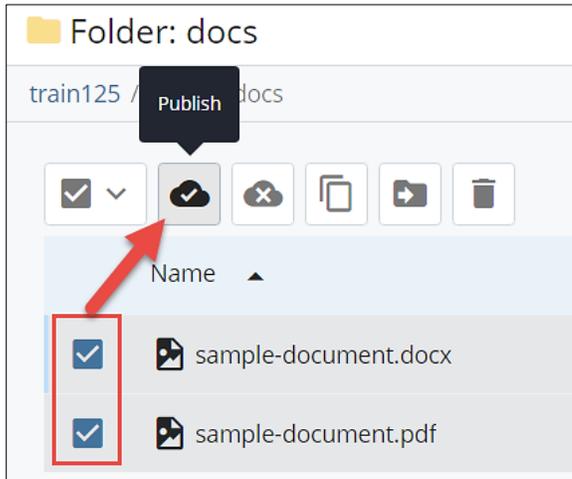


To publish an object from the CMS:

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

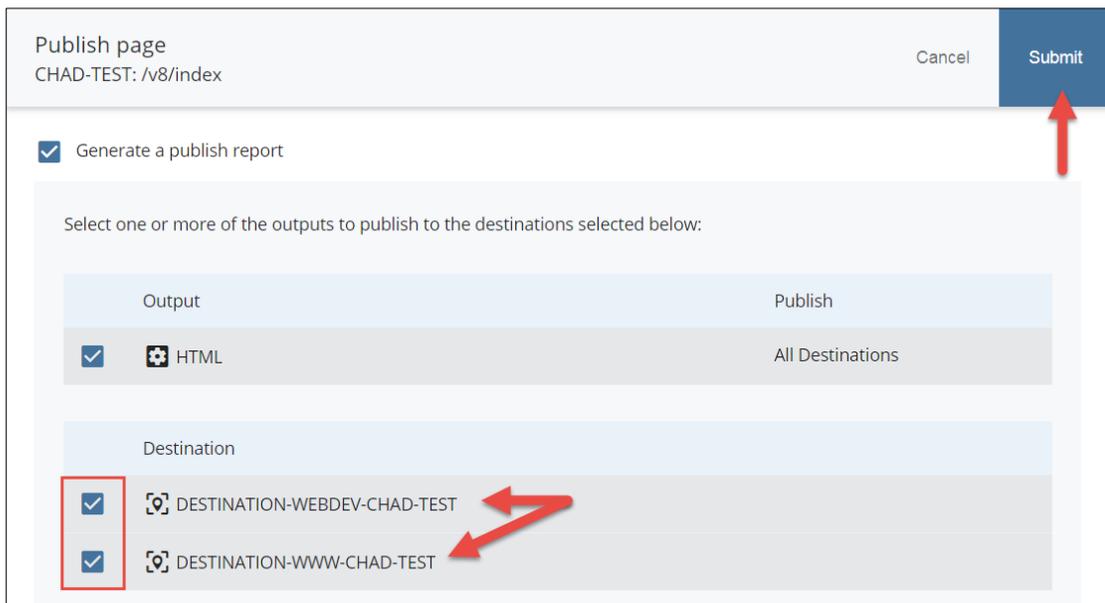
2. Click **Publish** (from the top of the screen.) 

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 public viewing in the WWW environment. (*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 – Understanding the CMS web address** 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 selecting the entire root site folder and clicking on Publish!)
- Review your page by opening a browser tab and navigating to:
 - **<http://webdev.uwyo.edu/train105/teaching-and-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).

↑
www = live site
webdev = review area

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.

http://www.uwyo.edu/sjrc/_files/documents/november_2017.pdf

↓

The opens the specified PDF document that is located in the _files/documents folder.

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

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

review area University of Wyoming main site opens index page in this folder

↳ fundingrequest folder
↳ index file

http://www.uwyo.edu/sjrc/_files/documents/november_2017.pdf

live site University of Wyoming main site _files folder, documents sub-folder opens the specified PDF file

↳ sjrc folder
↳ _files folder
↳ documents folder
↳ november_2017.pdf file

Appendix B – Web CMS image 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!

College-Department Overview template	
Masthead image	2210 x <i>up to 670</i>
2 Column – Image	690 x 690*
2 Column – Slider	576 x 578
2 Column Image with Title	767 x 503
3 Column – Inline Employee	950 x 685
Photo Gallery	615 x 376

*smaller images will be shown as actual size; larger images will be downsized to fit

College-Department Advanced template	
Masthead image	2210 x <i>up to 670</i>
Background image (parallax)	2210 required width
4+ Image Carousel	576 x 578
2 Column Image with Caption	767 x 332
3 Column Image with Caption	767 x 503
2 Column Split – Image	690 x 360
2 Column Split – Slider	576 x 578
2 Column Split – Callout Image	690 x 690
Info Cards	425 x 250
Up to 4 Columns – Image or Slider	576 x 578
Photo Gallery	615 x 376

Faculty Staff template	
Masthead image	2210 x <i>up to 670</i>
Faculty/staff photo	125 x 150

Summary template	
Masthead image	2210 x <i>up to 670</i>
Summary photo	125 maximum width

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** and learn more 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**.

Required Information

What publication / website will you be using these photos for?

Department
Select multiple departments by holding down <ctrl> and left clicking each applicable option.

- College of Engineering and Applied Science - Environmental Department
- College of Engineering and Applied Science - Mechanical Department
- College of Engineering and Applied Science - Petroleum Department
- College of Health Sciences
- College of Health Sciences - Communication Disorders
- College of Health Sciences - Dental Hygiene Department
- College of Health Sciences - Family Medicine Residency Program at Casper
- College of Health Sciences - Family Medicine Residency Program at Cheyenne
- College of Health Sciences - Health Sciences Minor
- College of Health Sciences - Kinesiology and Health (School of Physical and Health Education)
- College of Health Sciences - School of Nursing

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

Appendix D – Connecting through VPN

Access to the UW CMS requires a connection to the UW network – either on campus or through a VPN.

To get connected:

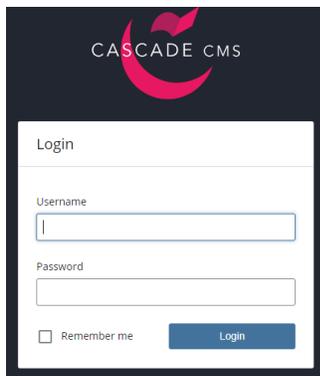
Download the PulseSecure software from <https://uwyo.teamdynamix.com/TDClient/1940/Portal/KB/?CategoryID=10424>

Once installed, open the PulseSecure application and connect to the network using your UW credentials and two-factor authentication.

Test your connection:

Visit <https://www.uwyo.edu/web/> and click on *Login to Cascade Server*.

If it shows the Cascade login screen, you are successfully connected!



If it shows an error message, then your connection was not successful.



This site can't be reached

`cascade.uwyo.edu`'s server IP address could not be found.

Try:

- Checking the connection
- Checking the proxy, firewall, and DNS configuration
- Running Windows Network Diagnostics

ERR_NAME_NOT_RESOLVED



Need additional help? Contact the UWIT HelpDesk.

Email: userhelp@uwyo.edu

Call: 307-766-HELP (307-766-4357)

