

# Cascade Server

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## Getting Started

### ***Access the Cascade Server***

The Cascade Server may be access by directing your browser to [cms.cornellcollege.edu](http://cms.cornellcollege.edu).

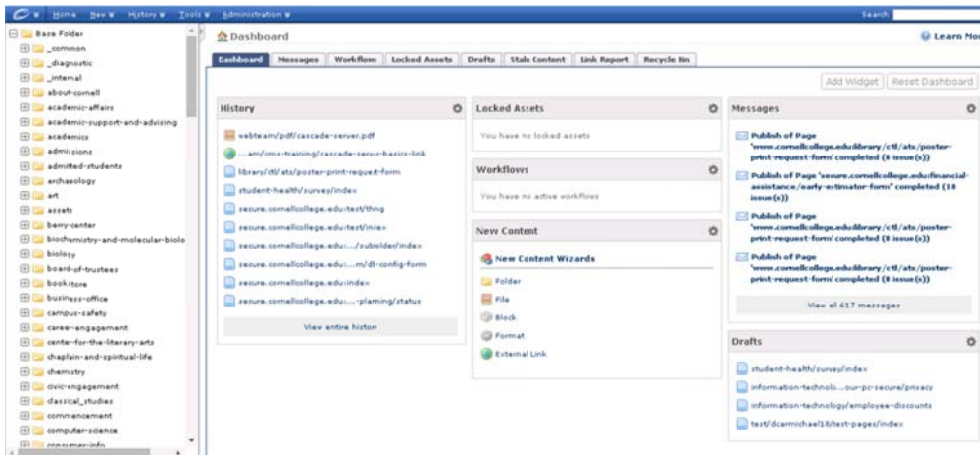
### ***Site Navigation***

Logging into the cms opens your default site. This can be changed according to your user preferences. To navigate between different sites, use the dropdown list in the upper left hand corner. Each site will display a different set of folders in the left-hand pane.



## The Dashboard

Our first step is to introduce the interface for Cascade Server. The image below shows the interface that you see first upon logging into the system. You can get back here at any time simply by clicking Home in the upper left corner.



The main editing window on the right displays your personal dashboard – any workflows or messages waiting, common tasks available, locked assets, and a list of recently visited assets.

If the asset tree is not already revealed on the left, try clicking the small arrow tab in the far upper left corner.

The asset tree is where your site is managed. In fact, each folder represents a different site that can be managed independently of the others with different levels of user access all from within one interface. You can collapse the asset tree by clicking on the grey tab between the two sections.

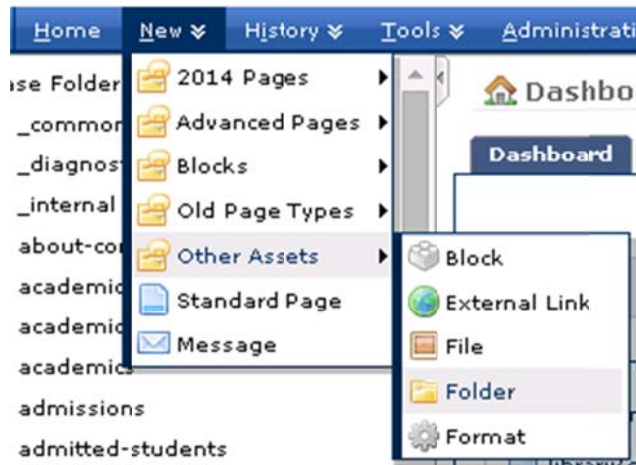
## Opening a Page

In order to browse the site, simply click on the test folder on the left side to expand the folder tree. Once the folder expands, the sub-folders and page assets are displayed in the same directory structure that exists when published.

## Creating a New Folder

You can create a new folder to organize your pages and files more easily. It is a good idea to make sure that all of your different types of files are categorized into folders to make updating them faster and easier.

1. Select the test folder inside of [www.cornellcollege.edu](http://www.cornellcollege.edu).
2. Click on the New button on the top navigation menu to display the different types of assets you are allowed to create. For our folder choose New ->Other Assets->Folder



3. In the form, fill in the Display Name, and System Name (use your Cornell username for both fields) for the new folder. Check the Publish and Index boxes. Click Submit. Ignore all errors associated with incorrect spelling.
4. Now create an images folder inside of your folder.
5. To hide this folder from the left-hand navigation on the published site, select the folder, click edit, and open the Metadata tab. Check the box after “Hide from parent navigation”.

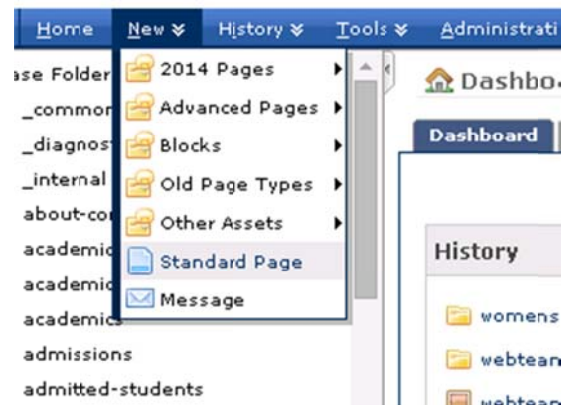
**Display Name** is the name of the file in the left navigation menu and in the breadcrumbs. The name should be short (under 25 characters) but descriptive. Longer names will cause an undesirable look to the navigation bar.

**System Name** is the physical name of the folder.

## Creating a Page

In addition to editing an existing page, you also have the ability to create new pages, and upload documents and images on your own. Let's go through the process of creating new content.

1. Select your folder that will contain the new page and click on the New button on the top navigation menu to display the different types of assets you are allowed to create.
2. Click on the type of page you would like to create. For our page, choose New-> Standard Page.



3. You'll notice that this type of page has a series of fields and a large word processor. Some types of content are more structured whereas others are less structured. For Display Name, type in "My First Press Release."
4. For Title, type in "My First Press Release in CMS."

A screenshot of the 'New Page' form in a CMS. The form has a 'Preview' and 'Create' button at the top. Below the buttons are tabs for 'Content', 'Metadata', 'System', and 'Outputs'. The 'Parent Folder' field is set to '[test, [redacted]]'. Under the 'Inline Metadata' section, the 'Display Name' field contains 'My First Press Release' and the 'Title' field contains 'My First Press Release in CMS'.

5. Now, scroll down to the bottom and click the Submit button at the bottom to record your changes.
6. You should now see the new page in your web browser.

Notice that the content from the word processor appears in the main region in a specific layout independent of the content you entered. Creating a new web page in the CMS saves you time as the content is automatically formatted for you and related hyperlinks to the page are created as well.

**Display Name** is the name of the page in the left-hand navigation

**Title** is the page title and is used for the default system name.

The **“Layout Options”** section adds some more optional features:

**Banner:** Allows you to add a banner image to the top of the page.

**Sidebar:** Allows you to add a sidebar on the right side of the page. Sidebars can contain text, images, and other advanced options.

**Neither** creates a normal page.

### ***Editing Metadata and Moving/Renaming Objects***

1. Click on the Move/Rename link in the dark blue bar to open the Move/Rename tab.
2. Change the system name to index.

The screenshot shows a user interface for editing page metadata. At the top, there is a horizontal menu with buttons for 'View', 'Edit', 'Move/Rename', 'Copy', 'Publish', 'Relationships', and 'More'. The 'Move/Rename' button is currently selected and highlighted in a dark blue color. Below this menu, there is a form with two main fields: 'System Name' and 'Parent Folder'. The 'System Name' field has a text input containing the word 'index'. The 'Parent Folder' field has a text input containing '[test]' followed by a folder icon and a search icon.

- **System Name** is the name of the file name for the page. This name should be short and concise. Use a – instead of a space for the system name. If this is a home (index) page, then the name should be "index."
- The **Parent Folder** is the folder that the page/folder resides in. If you want to move this page to a different folder, click on the folder icon and select a new folder in the pop-up window that will appear.
- If you check **Publish** the page you create will be published live when your page or folder is published. Non-published pages are not accessible to people visiting the site.
- The rest of the data on the System Tab should not be edited.

## **Metadata Tab**

Metadata is additional data that describes the information on the page. It is generally used for search engines.

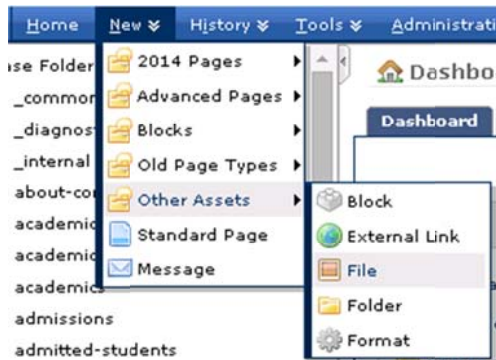
- Summary is a longer summary of the document. Sort of a who, what, when, where field.

## Uploading a File

You can link to files outside of the CMS or upload a file directly into the CMS.

Uploading files is the preferred method because it keeps all your items in one spot, allows you to move/rename the file without breaking links, and will publish the file if the web site is moved elsewhere.

1. Select the folder that you want to house the file or files.
2. Choose New->Other Assets -> File



3. Enter the display name and text.
4. Click the browse button to find the file on your computer.
5. Fill out relevant system data and metadata.
6. For our purposes we will upload a file to your images folder.

## Uploading an Image

If an image is uploaded to the CMS a few more options are available and the image can be edited directly in the CMS. Using the same steps from Uploading a File an image can be uploaded. Under Edit Image there are several buttons from left to right. Undo, Redo, Width (in pixels), Height (in pixels), Resize, Rotate Clockwise, Rotate Counter Clockwise, Flip Horizontally, Flip Vertically, and Crop

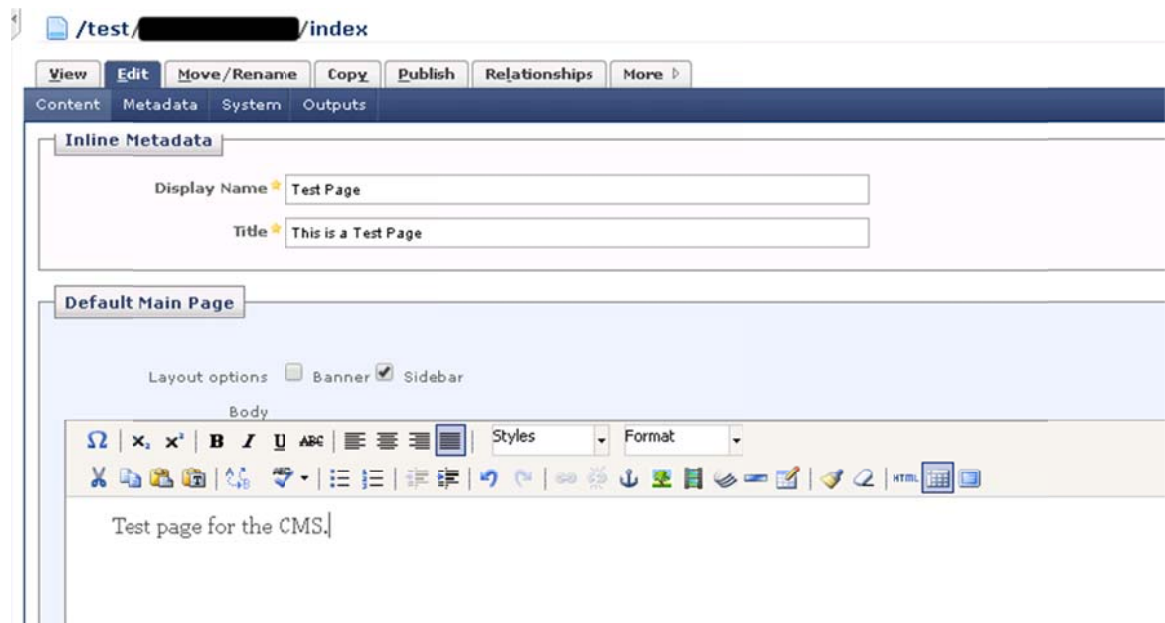


- To resize an image you may set the width/height in pixels and then click the check mark. Clicking the link icon between width and height will allow the image to be stretched non-proportionally.
- To crop an image highlight the part of the picture you want to keep and click the crop button.

## Editing a Page

Editing a page in the CMS is very similar to editing a Microsoft Word® document on your hard drive.

1. Start by locating the page in the asset tree and clicking on the page you would like to edit. In this case, we are editing the page /test/yourname/index.
2. Once the page has loaded, click on the Edit tab located above the page next to the active View tab.
3. From here you are able to edit all the content of the designated region. Make the desired changes to the document just as you would using a standard word processor. Please keep the editor open as we continue with the getting started guide.

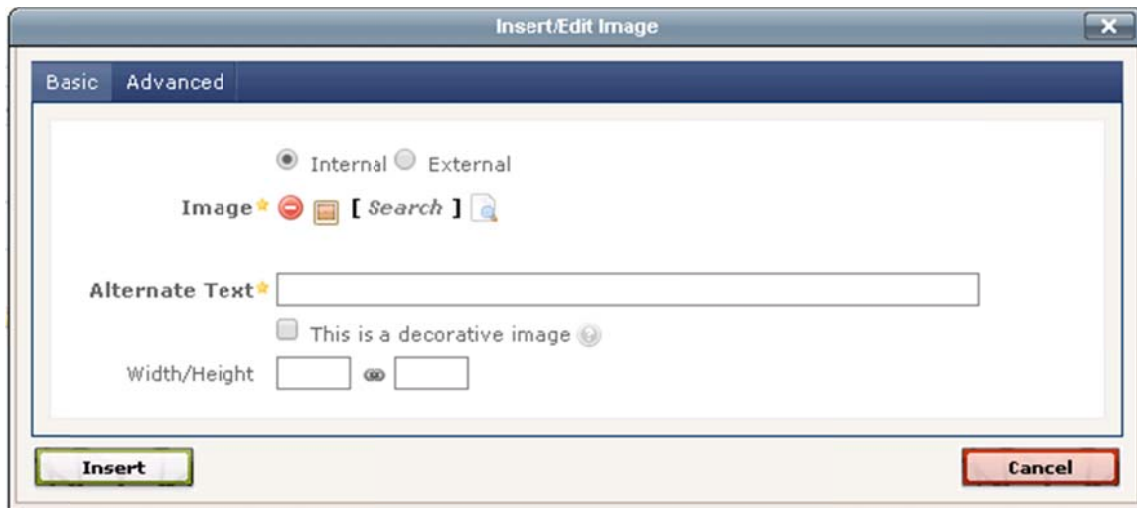



## Using the Word Processor

The word processor, also called the WYSIWYG (what you see is what you get) editor, integrated in the CMS system has the same functionality and features you are most likely accustomed to using in a standard editor.



## Inserting an Image



1. Now we want to insert an image. Place your mouse cursor in the area desired for the image and click on the insert image icon  on the toolbar.
2. The insert image window offers two options – one for internal images and one for external. We are going to insert an image that is already in the system, so we'll stay on the default Internal tab.
3. Next to Image, you will see two icons – a red cancel/delete icon, and an image icon. Click on the image to open a new window that will allow you to select an image to insert.
4. In the new image chooser window, click on the select intranet on the left asset tree follow by the folder files and then the folder images and finally the image file you uploaded previously.
5. With the image selected, click Confirm to close the window.
6. The image path will appear in the insert image window. In the Alternate Text field, type in the text representation of the image “Company Logo.”
7. Now click Insert for the image to be placed in the word processor.

## Inserting a Hyperlink

1. With our image inserted we now want to put in a hyperlink.
2. Highlight the word or words you wish to turn into a hyperlink.

3. Click the insert web link icon on the toolbar. The insert link window will now open, and you will again see two options – one for internal links, and one for external. We're inserting a link to another page of our site, so we'll stay on the default Internal tab.



- a. Creating a link to an external page is a matter of selecting External and pasting the link into the Link text box Link.
4. Next to Link you will see two icons – a red cancel/delete icon, and a page icon. Click on the page icon to open a new window that will allow you to select the page you wish to link to.
5. Select Base Folder on the asset tree followed by the page index (near the bottom of the asset tree). With the page selected, click Confirm to close the window.
6. Now, back on the insert link window, click the Insert button. The window will close, and the hyperlink will be placed around the selected word processor text.

## Changing Metadata

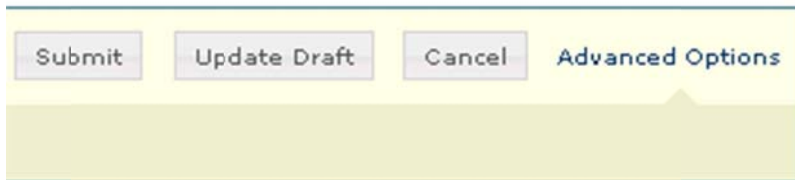
1. With our image and hyperlink inserted, we now need to update the metadata about the page. Metadata is information that describes the asset, and includes a summary, title, keywords, author, and other items which are used for a variety of tasks in a CMS. Metadata is particularly important in creating dynamic navigation menus such as site maps and context navigation. To edit the page metadata, please click on the Metadata pane directly above the word processor toolbar.



The screenshot shows a software interface with a top navigation bar containing tabs: Content, Metadata, System, and Outputs. Below this, there are two main sections for editing metadata. The first section, titled 'User Metadata', contains a 'Description' text input field and a 'Review Date' field with a calendar icon, a time selector set to '12:00 AM', and a dropdown arrow. The second section, titled 'Custom Metadata', contains an 'SEO Title' text input field and a 'Hide from Navigation' checkbox with the label 'Hide' next to it.

2. There is nothing to change in the Metadata tab right now, so click back on the Content pane again to continue editing the page in the word processor.

## Saving Content



The screenshot shows a horizontal row of four buttons: 'Submit', 'Update Draft', 'Cancel', and 'Advanced Options'. The 'Submit' button is highlighted with a light blue background, while the others are light gray. Below the buttons is a light yellow background area.

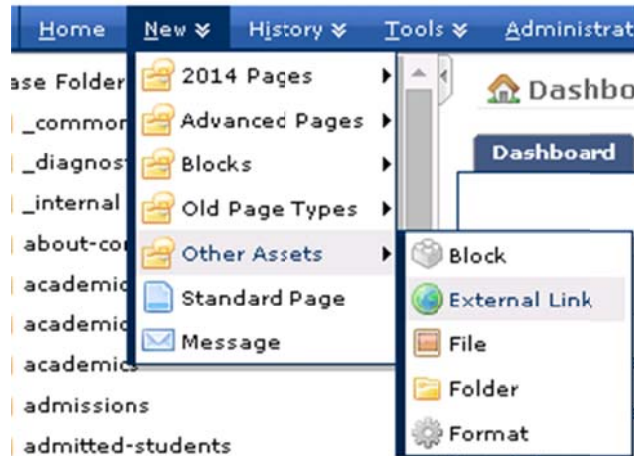
With our example changes complete, it is now time to save our content. To save your changes click the Submit button below the word processor.

Congratulations! You've just edited your first web page in the CMS. You should see the changes you made reflected throughout the page including the main content region (word processor), left context navigation menu (metadata), and page heading (metadata). Updating information and metadata in CMS provides for a consistent look-and-feel throughout your website making it easy to navigate for visitors.

## Adding a New Link to the Left Navigation

The left navigation menu is the main navigation for getting between pages on Cornell's web site. You can add internal or external pages to the navigation.

1. Select the folder/page to which you would like to add the link.
2. From the top menu, select New-> Other Assets-> External Link.



3. Enter the Display Name and link.
4. Go to the system tab and enter the system name.
  - The display name is the text that appears on the left hand navigation. This text should be limited to 25 characters if possible to keep the proper look of the menu.
  - The link is the url that you want to go to.
  - External links will display a globe signal

## Arrange Left Navigation Menu Items

You can change the order of the left hand navigation menu from the default.

1. Click the folder that houses the pages you wish to re-arrange.
2. Use the up/down arrows on the right to move page up and down. There are buttons for moving the page up/down one spot and moving them to the top/bottom.
  - In some instances when a page does not seem to want to move up/down one spot try moving it to the top/bottom and then moving it by one spot.

## Publishing Your Content

Your information is not available until you publish it. If you are publishing a new page you may need to publish other pages as well.



The screenshot shows a web publishing interface. At the top, there is a breadcrumb path: `/test/[redacted]/index`. Below this is a menu bar with buttons for `View`, `Edit`, `Move/Rename`, `Copy`, `Publish` (highlighted), `Relationships`, and `More ▾`. The main content area is divided into three sections: `Output`, `Destination`, and `Options`. In the `Output` section, there is a checked checkbox for `HTML All Destinations`. In the `Destination` section, there is a checked checkbox for `Webmain`. In the `Options` section, there are two rows of options: `Publish Report` with a checked checkbox and `Generate a publish report message`; and `Publish Mode` with a selected radio button for `Publish` and an unselected radio button for `Un-publish`. At the bottom of the dialog, there are two buttons: `Submit` and `Cancel`.

1. Click the page or folder you wish to publish.
2. Click the publish tab at the top.
3. Click Submit
  - Note that you can unpublish a page as well as publish it.
  - If you are publishing a new page, image, or unpublishing a page you may need to publish multiple pages to update navigation and files.