

Quick Reference Guide

Cascade Server

Cascade, our content management system, is used to modify websites/web pages at the University of Richmond. This Quick Reference Guide will provide step-by-step instructions on completing some of the most common tasks while using the CMS.

Logging In and Navigating

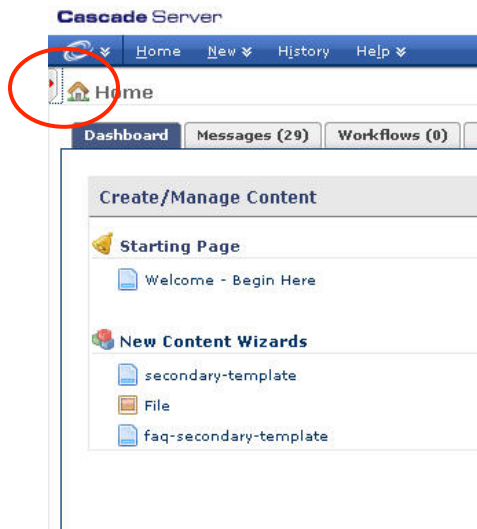
Accessing Cascade

1. <https://cas.richmond.edu:8443>
2. Enter your login credentials (net ID and password).
3. Click the **Log in** button.
4. Select your site from the drop-down list.



Exposing the Left Asset Tree

1. After logging into Cascade, click the red arrow on the left edge of your screen.



2. Expand the **external** folder. You will see your site folder.
3. Click on your site folder. You will see your website structure.

If you would like to navigate via the right pane, be sure to select the index page. This is your site homepage

Page Editing

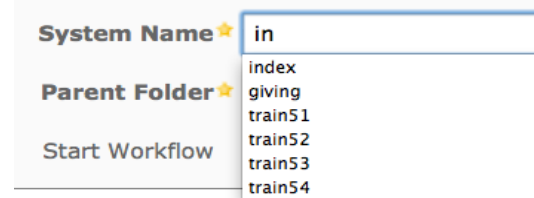
Edit a Page

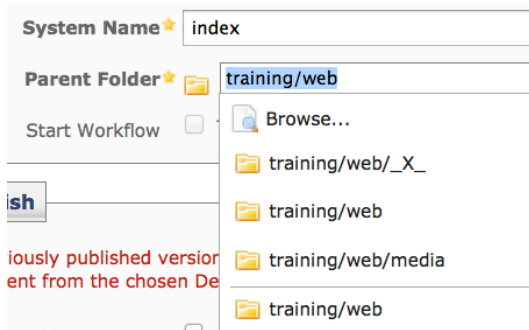
1. Select the desired page from the left asset tree or by clicking through your site in the right pane.
2. Click the **Edit** tab.
3. Make the necessary changes.
4. Scroll down and click the **Submit** button.

Your changes are saved in Cascade, however the page should be published or submitted through workflow in order to display on the live website. Refer to the workflow section for more details on working through a workflow.

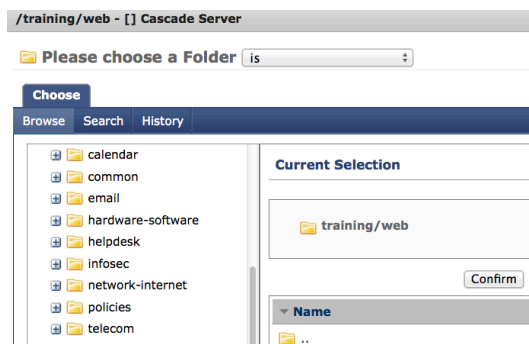
Move/Rename Pages

The Cascade chooser widget has undergone a round of improvements. When clicking on a chooser, a text box will now appear into which search terms can be typed. Below the text box, a dropdown will appear that contains both recent history items matching the type of the chooser as well as search results matching the text in the chooser text box.





The old chooser pop-up window has been converted into an inline overlay and can be used in the exact same manner as the old chooser. This interface can be accessed by clicking the **browse icon next to the chooser text** or by clicking the **"Browse..."** item that is displayed in the dropdown menu.



Working with Links

Insert an Internal Hyperlink

Internal hyperlinks are defined as links that point to a page or file within your website (or site folder).

1. While in Edit mode, select the text you wish to convert to a link.
2. Click the **Insert/Edit link** button.
3. Select **Internal** radio button
4. Click the page icon to **Browse** to a page/file within your site folder.
5. Click **Confirm**.
6. Click **Insert**.
7. If necessary, repeat steps 1 – 5 for additional hyperlinks.
8. Scroll down and click the **Submit** button.

After submitting the change, you may preview your changes via the workflow screen or directly if not in a workflow. Links can not be tested in edit mode.

Insert an External Hyperlink

External hyperlinks are defined as those links that point to a page or file outside of your website. This includes other University of Richmond websites.

1. While in Edit mode, select the text you wish to convert to a link.
2. Click the **Insert/Edit link** button.
3. Select the **External** radio button.
4. Enter the URL of the website in the Link text area. *Note: You may copy/paste the URL from a separate browser window.*
5. Click **Insert**.
6. If necessary, repeat steps 1 – 5 for additional hyperlinks.
7. Scroll down and click the **Submit** button.

Insert an Email link

1. While in Edit mode, select the text you wish to convert to a link.
2. Click the **Insert/Edit link** button.
3. Select the **External** radio button.
4. Enter the text `'mailto:'` immediately followed by the email address (no spaces).
5. Click **Insert**.
6. If necessary, repeat steps 1 – 5 for additional hyperlinks.
7. Scroll down and click the **Submit** button.

Inserting an Anchor Link

1. Position your cursor at the point in the page where you would like to return.
2. Click the **Insert/Edit anchor** button.
3. Enter a name for the new anchor (no spaces or odd characters; case-sensitive).
4. Click the **Insert** button.
5. Follow the *Insert an Internal Hyperlink* steps 1 and 2.
6. Enter the name of your anchor in the *Anchor* text box.
7. Click the **Insert** button.
8. Click the **Submit** button.

Button and Text Promos

Add a Button Promo (Related Link)

Button promos (or related links) are the blue buttons that appear on the right side of content pages. These promo items are designed to connect your readers to information that is relevant to the main content.

1. While in Edit mode, scroll down the page using your browser scroll. You will see the Promo section.
2. Click the plus (+) symbol to the left of the promo item.
3. The screen will refresh.
4. Select **Button promo** from the *Promo Type* drop-down list.
5. Enter a heading. This is the text that will display on the button.
6. Click the **browse** button for one of the following:
 - a. *Internal Hyperlink* (pointing to a page within your website)
 - b. *Internal PDF* (pointing to a file within your website)
7. If you prefer to link to a website or file outside of your site, use the *External hyperlink* (pointing to a website or file outside of your site) option by entering the complete URL in this text area.
8. Click **Submit** to save.
9. Repeat steps 1 – 7 to add additional promo buttons. You may have a maximum of five promo buttons.

Remove a Button Promo (Related Link)

Button promos (or related links) are the blue buttons that appear on the right side of content pages. These promo items are designed to connect your readers to information that is relevant to the main content.

1. While in Edit mode, scroll down the page using your browser scroll. You will see the *Promo* section.
2. Click the minus (-) symbol to the left of the promo item you wish to remove.
3. The promo is removed.
4. Click **Submit** to save.

Add a Text Promo

Text promos are the text areas with gray background that appear on the right side of

content pages. These promo items are designed to emphasize or accentuate portions of your main content. You may have a maximum of two text promos per page.

1. While in Edit mode, scroll down the page using your browser scroll. You will see the *Promo* section.
2. Click the plus (+) symbol to the left of the promo item.
3. The screen will refresh.
4. Select **Text promo** from the *Promo type* drop-down list.
5. Move down the WYSIWYG text area and enter your text.
6. Click **Submit** to save.

Remove a Text Promo

Text promos are the text areas with gray background that appear on the right side of content pages. These promo items are designed to emphasize or accentuate portions of your main content. You may have a maximum of two text promos per page.

1. While in Edit mode, scroll down the page using your browser scroll. You will see the *Promo* section.
2. Click the plus (-) symbol to the left of the promo item.
3. The promo is removed.
4. Click **Submit** to save.

Reordering promo items

In addition to adding and removing promo items, you may also modify the order of appearance.

1. Identify the promo item you wish to move.
2. In the upper left of the promo, move the item up or down using the **black arrows**.
3. Click **Submit** to save.

New Pages and Files

Create a New Page

1. Click on the folder that should contain your new page. **Note:** *This will relate directly to the page URL.*

2. From the Cascade main menu select **New | secondary-template**.
3. Enter a name for your new page in the *System Name* field. **Note:** *This name should use all lowercase letters and contain no spaces. The only acceptable symbol is the dash.*
4. Enter your page content and add any promo items.
5. Click the **Metadata** button.
6. Enter a relevant page title. **Note:** *This will usually be identical to the Heading 1 page title.*
7. Scroll down and click the **Submit** button.

If your campus unit is in workflow, please skip to the Workflow section. Otherwise, you may publish your page.

Upload a New File

Uploading is the first step, should you decide to link to a PDF file or image.

1. Select the folder that should contain your new file.
2. From the Cascade main menu, select **New | File**.
3. In the middle of the page you will see the "drop zone" that allows you to drag files from your desktop directly into the Cascade interface. You can drag your file into the box. Or, Choose the **Browse** (or **Choose** File if on Mac) button and select your file in the *File Upload* dialog box. Click the **Open** (or **Choose**) button on the *File Upload* dialog box.
4. Click the **System** button.
5. Eliminate any spaces or shorten the filename if necessary.
6. Click the **Submit** button.
7. Publish the file.

Working with Workflow

Creating a Workflow

1. After clicking the submit button on your newly edited page, you will be prompted to create a workflow. By default, the page Title will display as the workflow name.

2. Enter comments to briefly describe the changes you have made.
3. Click the **Submit** button.

You have successfully created a workflow. At this point your approvers are still unaware of the changes you have made.

Previewing a page while in Workflow

1. Once the workflow is created, you may click on the page icon within the workflow screen to review your changes.
2. Click the Workflow name to return to the workflow screen.

Workflow Actions

1. While in the workflow screen, you will notice a section containing *Actions – Continue Editing or Forward to XX-Managers*.
2. If after previewing your page, you have a need to make additional changes, click the Continue Editing option.
3. Your page will display in edit mode and you may continue modifying the page.
4. Click **Submit** to save your changes. **Note:** *You may be prompted to enter additional comments. Feel free to click the Submit button to bypass those comment opportunities.*
5. If you have completed the editing process, select the *Forward to XX-Managers* option.
6. Click **Submit**. **Note:** *You may be prompted to enter additional comments. Feel free to click the Submit button to bypass those comment opportunities.*
7. You will now await approval.

Publishing your changes

Publish a page/directory

Publishing can be executed at the page level, sub-directory level or site folder level with proper permissions. Publishing is the process of making a page live.

1. With the page, sub-directory or site folder selected, click on the **Publish** tab. *Note: If you do not have this tab, you do not possess sufficient permissions and are more than likely in a workflow.*
2. Click the **Submit** button.

Test Your Edits By Publishing to QA

Publish to QA

If you are a publisher in Cascade, you have the option of previewing your web edits online prior to publishing to your live website.

Publishing to QA enables you to view your website edits without impacting your live website. Here's how it works:

1. Select your page and initiate a publish job by clicking the **Publish** tab. You will be presented with a list of publishing destinations.

The screenshot shows the 'Publish' dialog box for the path '/policies/index'. It features a menu bar with 'View', 'Edit', 'Move/Rename', 'Copy', 'Publish', and 'More'. The dialog is divided into three main sections: 'Page Configuration', 'Destination', and 'Options'. In the 'Page Configuration' section, 'HTML' and 'XML' are checked. In the 'Destination' section, 'IS - cmsweb1', 'IS - cmsweb2', and 'IS-QA' are checked. In the 'Options' section, 'Generate a publish report message' is checked, and 'Publish Mode' is set to 'Publish' (radio button selected). 'Submit' and 'Cancel' buttons are at the bottom.

2. *Uncheck the cmsweb1 and cmsweb2 check-boxes; leaving only the QA option selected.*

This screenshot is identical to the previous one, but the 'Destination' section shows 'IS - cmsweb1' and 'IS - cmsweb2' unchecked, and only 'IS-QA' is checked. This represents the state after step 2 of the process.

3. Click the **Submit** button. Your job will publish to:

<http://qasitename.richmond.edu/folder/page.html>

4. Use this space to check your page content or form functionality. If all is well, you may publish your form as usual; being certain that **all three check-boxes** are selected.