Quick Reference Guide

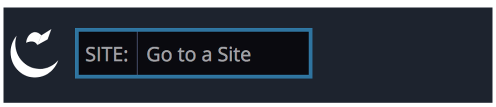
Cascade Server

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

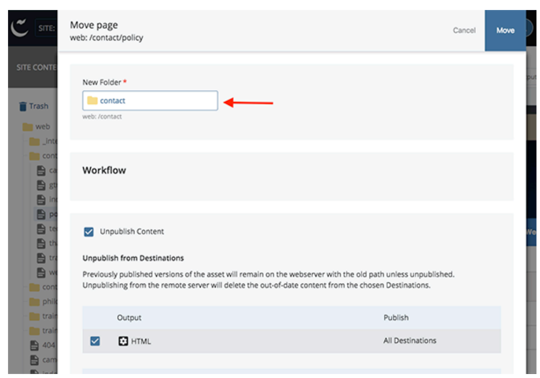
Accessing Cascade

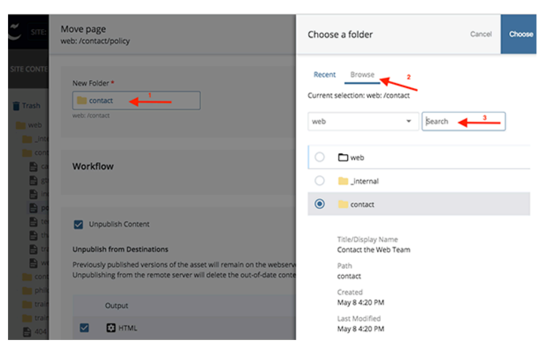
1. https://cas.richmond.edu:8443
2. Enter your login credentials (net ID and password).
3. Click the **Log in** button.
4. Select your site from the drop-down list.



Move 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 **More** and then the **Move** options in the right hand corner of the page.
3. Click the link to the right of the Parent Folder name.
4. The Choose dialog box appears.
5. Select the new parent folder from the dialog box.
6. Click the Confirm button





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** icon.
3. Make the necessary changes.
4. To save and preview your change, click the **Preview Draft** button.

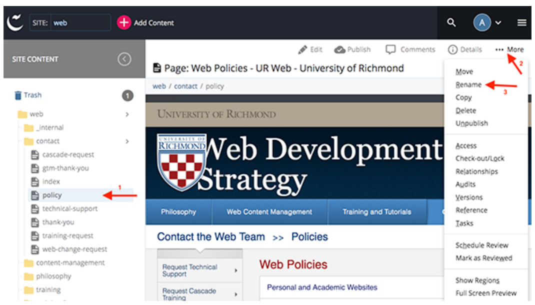
Your changes are saved in Cascade, however the page should be published or submitted through workflow in order to display on the live website. Refer to the workflow section for more details on working through a workflow.

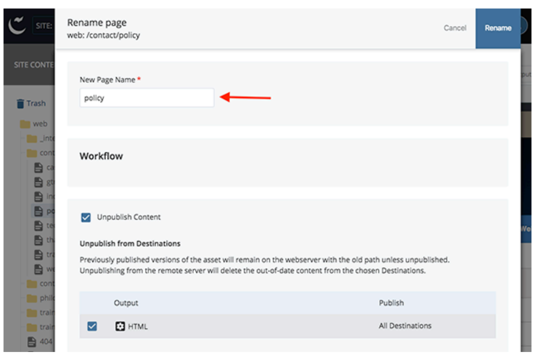
Move/Rename Pages

Remember: If you do not un-publish the existing page before moving or renaming, that page will continue to be live and available to users. As demostrated below: This increases the chances of users accessing inaccurate data.

Rename 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 **More** and then the **Rename** options in the right hand corner of the page.
3. Replace the text in the System Name field with your desired page name. ***Note:*** *This name should contain no spaces; dashes are permitted.*
4. Click the Submit button.





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 the **Internal** box.
4. The choose a file, page or link dialog will appear.
5. Navigate to the desired page or file by clicking through the folder structure.
6. Click the Choose button to select the page/asset.
7. The dialog box closes and the confirmed path is displayed under the Link Source box.
8. Click the **OK** button.
9. You return to the page in Edit mode with the new hyperlink visible.
10. If necessary, repeat steps 1 – 9 for additional hyperlinks.
11. To save and preview your change, click the **Preview Draft** button. ***Note***: You can test your link in this mode to ensure it points to the proper page/asset.
12. To save your work, click the **Submit** button, enter comments, and submit again.

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** box.
4. Enter the URL of the website in the Link Source field. ***Note****: It is much easier to open a new window, browse to the actual site and copy the URL from the address bar.*
5. Click the **OK** button.
6. You return to the page in Edit mode with the new hyperlink visible
7. If necessary, repeat steps 1 – 6 for additional hyperlinks.
8. To save and preview your change, click the **Preview Draft** button. ***Note***: You can test your link in this mode to ensure it points to the proper page/asset.
9. To save your work, click the **Submit** button, enter comments, and submit again.

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** box.
4. Enter the text '`mailto:`' immediately followed by the email address (no spaces) in the Link field.
5. Click the **OK** button.

6. If necessary, repeat steps 1 – 5 for additional hyperlinks.
7. To save and preview your change, click the **Preview Draft** button. ***Note***: You can test your link in this mode to ensure it points to the proper page/asset
8. To save your work, click the **Submit** button, enter comments, and submit again.

Button and Text Promos

Add a Button Promo (Related Link)

Button promos (or related links) are the blue buttons that appear on the left 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 right 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 Link* (pointing to a page within your website)
    b. *Internal Link 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 URL* (pointing to a website or file outside of your site) option by entering the complete URL in this text area.
8. Repeat steps 2 – 7 to add additional promo buttons. You may have a maximum of five promo buttons.
9. Click **Preview Draft** to save.
10. To save your work, click the **Submit** button, enter comments, and submit again.

Remove a Button Promo (Related Link)

Button promos (or related links) are the blue buttons that appear on the left 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 right of the promo item you wish to remove.
3. The promo is removed.
4. Click **Preview Draft** to save.
5. To save your work, click the **Submit** button, enter comments, and submit again.

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 right 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 **Preview Draft** to save.
7. To save your work, click the **Submit** button, enter comments, and submit again.

Remove a Text Promo

Text promos are the text areas with gray background that appear on the left 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 right of the promo item.

3. The promo is removed.
4. Click **Preview Draft** to save.
5. To save your work, click the **Submit** button, enter comments, and submit again.

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 right of the promo, move the item up or down using the **black arrows**.
3. Click **Preview Draft** to save.
4. To save your work, click the **Submit** button, enter comments, and submit again.

New Pages and Files

Create a New Page

1. In the Site drop-down menu in the upper left corner, choose the Site to create content in. You can type or search for the name. ***Note****: This will relate directly to the page URL.*
2. Once on a Site, click on the "Add Content" button. This dropdown is filled with your sites available page templates.
3. Click on one to begin creating content.
4. Replace the template name (KP4-SECONDARY-PAGE for example) with your page name. ***Note****: This name should use all lowercase letters and contain no spaces. The only acceptable symbol is the dash.*
5. Enter your page content and add any promo items.
6. Click the **Metadata** button.
7. Enter a relevant page title. ***Note****: This will usually be identical to the Heading 1 page title.*
8. Click **Preview Draft** to save.
9. To save your work, click the **Submit** button, enter comments, and submit again.

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. Select **Add Content** | **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. Eliminate any spaces or shorten the filename if necessary.
5. Click the **Preview Draft | Submit** button to upload and save your file.
6. 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 **Start Workflow** 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 *Available Actions* – (for example: *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. Enter comments to briefly describe the changes you plan to make.
4. Click **Submit Comment** button
5. Your page will display in edit mode and you may continue modifying the page.
6. Click **Preview Draft** then click **Advance** to save your changes to the current version and advance to the next steps of the workflow.
7. You are prompted to enter comments again.
8. Click **Advance Workflow** to save your changes.
9. You are returned to the Workflow screen where you may opt to continue editing or forward to the manager group
10. If you have completed the editing process, select the *Forward to XX-Managers* option.
11. Click **Submit Comment**. ***Note**: You may be prompted to enter additional comments. Feel free to click the Submit Comment button to bypass those comment opportunities.*
12. 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** icon. ***Note**: If you do not have this option, you do not possess sufficient permissions and are more than likely in a workflow.*
2. Click the **Publish** button again.

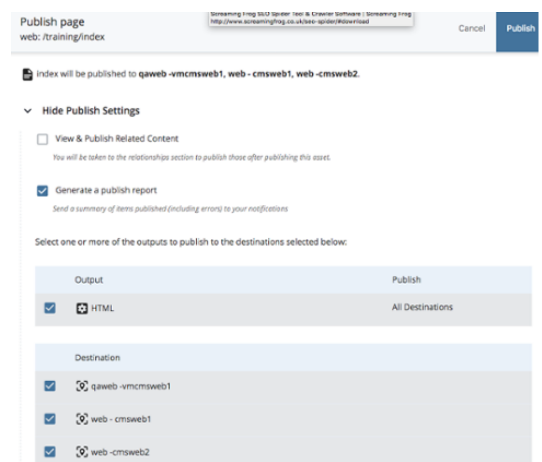
Test Your Edits By Publishing to QA

Publish to QA

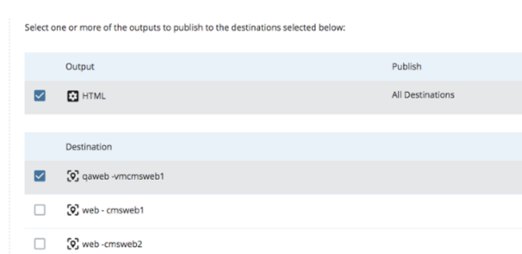
If you are a publisher in Cascade, you have the option of previewing your web edits online prior to publishing to your live website.

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*** icon. You will be presented with a list of publishing destinations.



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



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

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

4. Use this URL to check your page content or form functionality, but keep in mind this will only work on the University network.
   If you want to view a site in QA off campus, you will need to use a VPN.
5. When you're ready to publish your changes to the live site, publish your form as usual (being certain that all three check-boxes are selected) as usual; being certain that **all three check-boxes** are selected.