

Introduction to Cascade Server (web content management system)

The SNC web site is being produced using a Content Management System (CMS) called Cascade Server. This system allows College units to manage their own web areas using a browser-based tool that requires no special software or knowledge of HTML. It also allows for a consistent look across the entire web site.

Logging in to Cascade Server

To log in, go to <http://www.snc.edu/cms> and log in with your regular network login ID & password. If you'll be working in Cascade for more than a few minutes, check the "Remember me" box to avoid being timed out and losing work. Only those who have been given access to Cascade can log in. To obtain access, your supervisor must complete a Web Access Application Form at <http://www.snc.edu/techsupport>. You will be added to the discussion list "cmsusers@snc.edu," which is used to inform you of system changes, upgrades, training, etc.

The page you will see when you first log in to Cascade Server is the "dashboard" (not pictured). Most users will not use most of what's on this page except for the "Messages." Most of your messages will be notes from the system regarding something that you have published. You can read these messages and delete or keep them. To return to the Dashboard at any time, click Home in the blue menu bar in the upper left corner of the screen.

The Cascade Server screen

The left-hand column lists all of the web site folders you can access. Most people will only see a few folders. To open a folder, click once on it. There's no double-clicking in this system. In the illustration below, the techsupport folder is open and you can see the other folders and files that are inside of it. Those with the blue page icon are web pages. Note that they do not have ".htm" or ".html" file extensions. The system will add the ".html" for you later, when you publish the page (see pg. 7 for more). To view a file, click once on it. In the illustration, the file named helpdesk has been selected and is shown on the right side of the window in "layout" view. Layout view is the default view that you get when you click on a file. It shows you how the entire file looks, and includes some small icons which you can ignore. "Preview" view is the same as Layout view, but without those icons. Notice the blue menu bar at the top (Home, New, etc.), the tabs below (View, Edit, etc.), and the darker blue menu bar below the tabs (Layout, Preview, etc.). These functions will be described later.



Naming files & folders

Important: On the web, file and folder names are more restrictive than with regular files. In Cascade Server and on any web server, file and folder names should contain only lower case letters, numbers, and if necessary, hyphens (-). Web file and folder names should **never** contain spaces! When naming files in Cascade Server, do not put “.htm” or “.html” at the end (the system will add “.html” when the page is published). Also, note that Cascade Server does not allow you to have a folder and a file in the same location with the same name. Finally, remember that your home page must be named “index” – do not rename this file!

Renaming files

If at all possible, try to permanently name files when you create them, so as to avoid renaming them later. If you do rename a file, follow these steps to ensure that there are no “orphaned” files left on the server:

1. Unpublish the file you intend to rename:
 - a. In the column on the left, click on the file you wish to rename, then click the Publish tab.
 - b. Under Destination, leave both “snc.edu/live web site” and “snc.edu/test web site” checked.
 - c. Change the “Publish Mode” from Publish to Un-publish.
 - d. Click the Submit button.
2. Rename the file:
 - a. In the column on the left, click on the file you wish to rename, then click the Edit tab.
 - b. In the blue bar under the Edit tab, click on System.
 - c. In the “System Name” box, change the name.
 - d. Click the Submit button.
3. Publish the renamed file as described on page 7.

Creating new pages

To create a new page, copy a page from the same folder. The new page will take on all of the characteristics of the copied page, including the navigation. Because you can't change the navigation, be sure to copy a page that has the *navigation* you want, rather than one that has the *content* you want (to copy content from another page, just copy & paste it). Do **not** copy pages from one top-level folder to another, or you'll end up with the wrong navigation! See page 6 for more about navigation.

1. In the column on the left, click once on the page you want to copy, then click the Copy tab at the top.
2. In the “System Name” box, give the page a new name. (Note that the fields labeled in bold with the small yellow star are the only ones that are required.) See above for information on proper file names.
3. To put the new page into a subfolder, click on the folder name next to “Parent Folder,” choose the desired subfolder, and click Confirm. Note that pages in subfolders will not have the same navigation as the pages in the main folder. Each subfolder has its own navigation based on the pages in that folder.
4. Click Submit. If the spell-checker or link-checker come up, review the results, then click Submit again.
5. Once the new page is created, be sure to change the Display Name, Title, and Page Header (see pg. 3).

Creating folders

1. In the column on the left, click on the folder inside of which you want the new folder.
2. In the blue menu bar at the top, go to New – folder.
3. In the “System Name” box (again, the bold, starred fields are the only ones required), enter a name for the folder. See the “Naming files & folders” above for information on properly naming folders & files.
4. If you don't want this folder to be published when the folder above it is published, uncheck “Include when publishing.” You should do this for test folders & folders whose contents aren't ready to go live yet.
5. Click Submit.

Deleting pages

To delete a file or folder, click on it on the left, then click the Delete tab at the top. When the confirmation screen comes up, **read it carefully** to be absolutely sure you understand what's being deleted, if it's being unpublished, and if so, from which destinations. If you're unsure of anything, ask for help *before* clicking Submit. When deleting files, be sure to unpublish them too, so that they're not “orphaned” on the server.



Be careful when deleting!

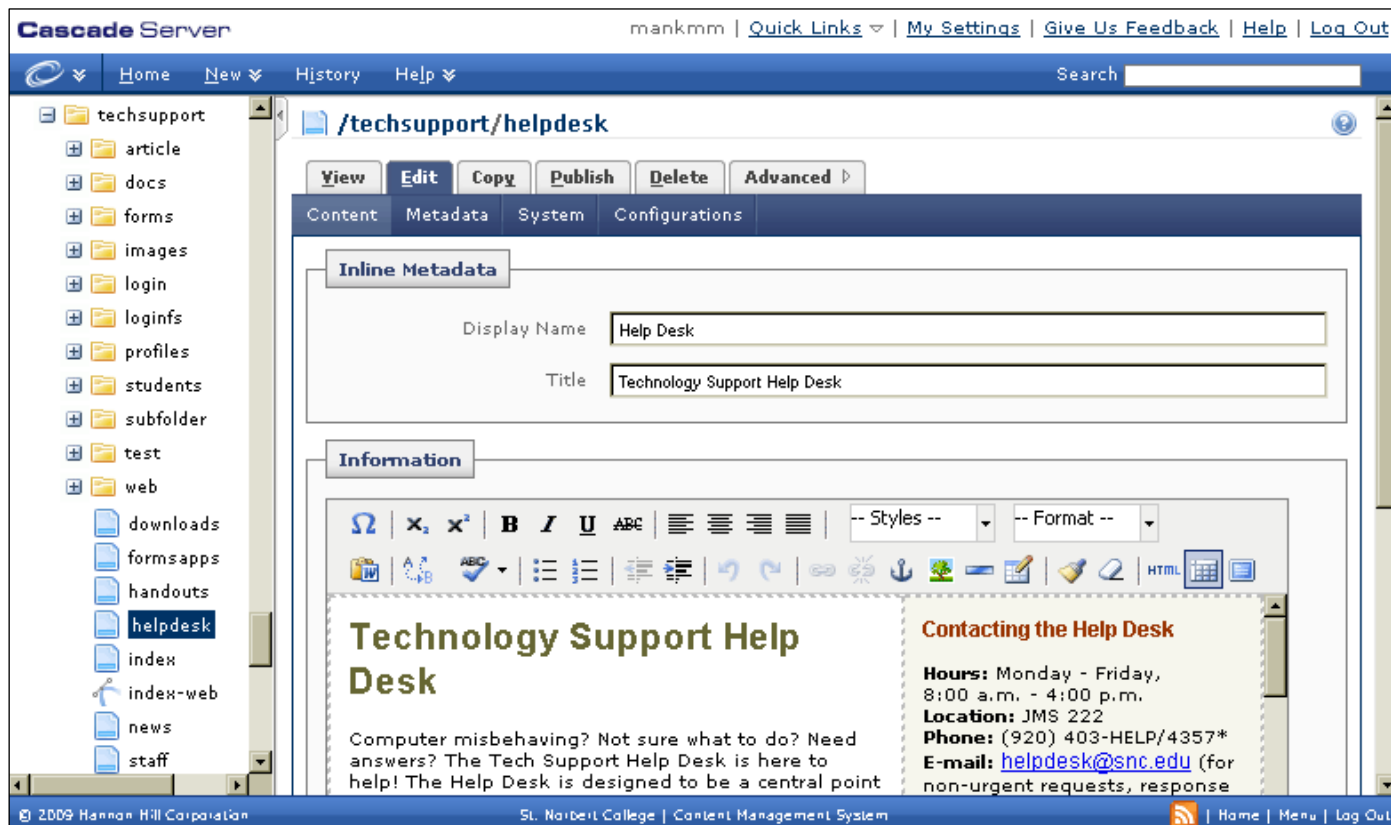
Once you delete something, it **cannot be recovered** in any way. If you delete the wrong thing, you'll have to recreate it from scratch.

Page properties

The top and left sides of each page are pre-defined – you cannot alter those areas except to specify which pages appear in the navigation menu. The white area on the right is your work area, where you will put your text and pictures. In editing mode, you will only see that part of the page (see illustration below).

To edit a page, click once on it on the left to view it, then click on the Edit tab. When the edit screen opens, the HTML code of the page will be displayed briefly. Just wait until it displays a screen like the one pictured below.

Below the Edit tab, shown here, you will see a dark blue menu bar with 4 options: Content, Metadata, System, and Configurations. The important aspects of these options are described below.



Content: This is the main editing screen, where you create & edit the page content. On this screen you will also find two very important boxes which must be filled in:

***Display Name:** This is the name of the page that is used in the navigation menu on the left. It is not used anywhere else. It may or may not be the same as the Title or Page Header (below).

***Title:** This is the title of the page that displays in the web browser's title bar, and is used when the page is bookmarked. Do not include the words "St. Norbert College" – the system will add that for you. You do not need to include your department name except when necessary to avoid confusion with other pages on the SNC site. (e.g., The title "Contact us" could be ambiguous – does it mean contact your department or contact SNC? – so you'd want to use the department name as part of the title, like "Contact Career Services.")

Metadata: Under Metadata, you can ignore everything except:

***Page Header** (optional): The Page Header appears at the top of the page in larger green text. It's unusual because instead of typing it on the body of the page, you put it in the Page Header box, and you can't see it in the WYSIWYG (What You See is What You Get) editor. You see it after you submit the page, on the View tab.

Include in Navigation: If you don't want the page in your navigation menu on the left, choose No. For more about editing the navigation menu, see the "Navigation menu" section on page 6.

System: Under System, you can ignore everything except:

***System Name:** This is the actual file name of the page, minus the ".html" – again, the system will add that for you when you publish the page. This is where you would rename a page (see pg. 2 for details).

Include with publishing: Normally you will leave this checked. It means that the page will be published to the server (made live) if the folder that includes it is published. If for any reason you want to keep a page from being published (e.g., if it's not finished yet, or is just a test page), uncheck this box.

Include when indexing: Leave this checked.

Configurations: Do not change anything on this screen!

**Starred items above are the various names each page can have, which can be somewhat confusing.*

Saving your work

To save your changes, click the Submit button at the bottom of the screen (you may need to scroll down to see it). If the spell-checker or link-checker come up, be sure to click Submit again after reviewing the results. Always remember to save your work **before** leaving the screen you're working on, e.g., if you need to refer to something on another page, or want to preview the page. Cascade Server will **not** warn you if you leave a page you're editing without saving first; you will just lose your work.

STOP Be sure to save your work!

In this system, it is very easy to lose your work because the system will **not** warn you if you leave a page without saving first. You must be very careful that you click the Submit button before clicking on another file or tab.

If you'd like to save your work but want to continue editing the page, click the Save Draft button. This saves your work temporarily but leaves you in editing mode. Your changes will not be applied to the active version of the page until you click Submit. This can offer protection against computer/browser crashes and accidental clicks (e.g., if you click away from the page before submitting). Note that once you click Save Draft, you'll then also have Update Draft and Discard Draft buttons.

Tip: It is recommended that you use Firefox's tab feature when using Cascade Server. If while working on a page you need to view another page, just open a new tab (CTRL+T or File – New Tab). You can use the new tab to visit another web page, or to view a different Cascade Server screen or page. To open a second Cascade tab, open a new blank tab, click back on your first Cascade tab, then drag the page icon from the address bar (in front of the "http://") down to the new tab, as shown in the illustration above.



Note that submitting a page only saves your changes in Cascade – it does not make them live on the web site. In order to make your site or pages live, you must publish them. (See the "Publishing" section on page 7.)

Versions

Cascade Server saves a version of the page each time you click Submit, so if something goes wrong, you can go back to an earlier version of the page. This can be useful, but also means that you should only save when you've actually edited the page. If you delete a page, all versions are deleted along with it. To view the available versions, with the date they were last modified and by whom:


1. Click once on the file on the left to view it, then click on the Advanced tab and choose Versions.
2. To see another version, click on it in the Path column. To return to the Versions list, use your browser's Back button.
3. To compare an older version to the current one, click on Compare with Current.
4. To restore that version (make it the current version), click on Activate.
5. To go back to the current version without activating an older one, click on Current.

Comments: If you're going to use the Versions, you may want to add comments when you edit pages. These comments do not appear on your web page, but they are saved with the file and displayed in the Versions list. You can use this for brief notes about why you edited the file, like "Updated staff listing." To add comments, go to the Edit screen and scroll down to the bottom. Click on the "Advanced Options »" link and type your comments in the "Version Comments:" box. Click the Submit button to save them.

Creating & editing page content

To edit a page, click once on it on the left to view it, then click on the Edit tab. When the edit screen opens, the HTML code of the page will be displayed briefly; just wait until it displays a screen like the one shown on pg. 3. When finished editing, click the Submit button at the bottom to save your changes.

The editing and formatting tools are very similar to those in Microsoft Word and other programs, so most of the buttons should be self-explanatory (bold, italics, centered, etc.). If you're not sure what a particular button does, hold your mouse pointer over it without clicking. The "-- Styles --" and "-- Format --" drop-down menus contain formatting for headings and subheadings.

To gain more screen space when editing, click the Toggle fullscreen mode button on the right side of the toolbar.  Click it again to return to the normal view.


Copying & pasting into Cascade Server

When you paste text into a page in Cascade, it will try to reproduce the formatting of the copied text. It may look okay, but it will cause problems later when you try to edit the page. To eliminate the unwanted formatting, use one of the following techniques. (For Mac instructions, see <http://www.snc.edu/techsupport/web/tips.html>.)



Do not copy & paste text from Word or web pages directly into Cascade. It will cause problems with page formatting. Instead, use the techniques described here.

1. Copy the text you wish to paste into Cascade Server. This can be from a web page, Word, etc.
2. Open Notepad (Start – Programs – Accessories – Notepad).
3. In Notepad, go to Edit – Paste (or Ctrl+v). You will see your text without the formatting.
4. In Notepad, go to Edit – Select All (or Ctrl+a) to highlight the text. Go to Edit – Copy (or Ctrl+c) to copy it.
5. On the Cascade edit screen, place your cursor where you want the text and go to Edit – Paste (or Ctrl+v).
Note: If you get an error message when pasting in Firefox, contact the Help Desk for a solution.




Copying from Microsoft Word

1. Open your Word document and copy the content you need.
2. On the Cascade edit screen, place your cursor where you want the text and click the Paste from Word button .
3. In the "Paste from Word" window, press Ctrl+v to paste the content into the window (or right-click and choose Paste), then click Insert.

Links

1. Select the text that you want to be linked (where people will click) and click the Insert/edit link button 
 - To link to another page in Cascade Server, click the  button. In the window that pops up, select the page you want to link to and click the Confirm button.
 - To link to an external (non-SNC) web site, click on the External tab. In the "Link" box, type or paste the address of the page you want to link to. Be sure to include the "http://" at the beginning.
 - To link to an e-mail address, click on the External tab. In the "Link" box, type or paste the e-mail address preceded by "mailto:" (without the quotes), e.g., `mailto:donald.duck@snc.edu`.
2. Do **not** change the "Target," "Title," or "Class" boxes.
3. Click the Insert button.

Linking within the same page (anchors)

1. To insert an anchor (the place on the page you wish to link to), put your cursor where you want the anchor and click the Insert/edit Anchor button. 
2. In the "Anchor name" box, type a name for the anchor with no spaces (e.g., myanchor) and click Insert. The anchor will be represented by a little  icon, but it will not appear on the live version of the page.
3. To link to the anchor, highlight the text to be linked and click the Insert/edit link button. 
4. On the Internal tab, in the "Anchor" box, type the name of your anchor (e.g., myanchor).
5. Click the Insert button.




Images

Uploading images

Images must be uploaded to Cascade before you can use them on a page. Put all image files in your “images” folder. You can create subfolders inside of the “images” folder if you like. You can also upload multiple images at once by putting them into a Zip file. See *Cascade Server: Image Editing & PDF Files* for details.

1. In the column on the left, click on the images folder to highlight it.
2. In the blue menu bar at the top, go to New – file.
3. In the Data section, click the Browse button.
4. Choose the file and click Open.
5. Click the Submit button. When the upload is complete, you will see the name of the image appear in the file list on the left and a preview of the image on the right.

Inserting images

1. Be sure that you’ve already uploaded the image you wish to insert (instructions above), then open the page in edit mode and click where you want the image.
2. Click the Insert/edit Image  (tree) button. In the window that pops up, click the orange Browse  button. Another window will pop up for you to select the image.
3. In the column on the left, locate the image you want and click once on it. Click the Confirm button.
4. Back in the first pop up window, you must fill in the Alternate Text box. Alternate text should describe the image very briefly, e.g., “Main Hall” for a photo of Main Hall.
5. Always leave the Width/Height boxes blank. In the Border Width box, type a zero (0). If desired, use the Alignment box to change the alignment of the image and how the text wraps around it.
6. Click the Insert button.
7. To edit an image after it has been inserted, click on the image, then click the Insert/edit Image  button.

Uploading PDFs & other non-html files


PDF files have to be uploaded to Cascade Server before you can use them on your site. If there are other types of non-web page files that you need for your site, you would upload them in the same way. For information on creating PDF files, see the handout *Creating PDF Files with PrimoPDF*, at <http://www.snc.edu/techsupport>.

1. In the column on the left, click on the folder in which you wish to put the file.
2. In the blue menu bar at the top, go to New – file.
3. In the Data section, click the Browse button.
4. Choose the file and click Open.
5. Click the Submit button. When the upload is complete, you will see the name of the image appear in the file list on the left, and Cascade Server should display the file on the right side.

If you need to upload a new version of a PDF, click on it on the left, click the Edit tab, and repeat steps 3-5.

Navigation menu

You will notice that when you’re editing pages, the navigation menu on the left side of the page is not visible (see picture on pg. 3). You cannot control the navigation menu directly; you do so through the properties of the pages in the folder. Whether or not a page appears in the navigation menu is controlled by the “Include in Navigation” option on the Metadata screen. If that’s set to Yes (the default), the page’s “Display Name” will appear on the navigation menu for all pages in that folder. To change the order of items in the navigation menu:

1. In the column on the left, click on your folder.
2. On the right, you will see a list of the folders and files in your main folder. To sort them by order number (2nd column), click on the word Order at the top of that column.
3. The items with the page icons  are your web pages. The order that they’re in in this list is the order in which they appear on the navigation menu. To change the order, click the arrows in the Actions column to move pages up or down. You only need to move the pages, not the folders (it doesn’t matter where the folders are; if you wish, you can move them to the bottom of the list to get them out of the way).

Note: If you rearrange the navigation menu or do *anything else* that affects it (e.g., deleting a page, changing the Display Name of a page, adding a page, etc.), the system will automatically update all of the necessary pages, but in order for the updates to be made live on your site, you must **republish all** of the effected pages.

Departmental contact information

Departmental contact information appears on each page. The contact e-mail address for the department must be a St. Norbert College departmental e-mail address. Personal e-mail addresses and non-SNC e-mail address are not allowed. If you don't have a departmental e-mail address, contact the Help Desk. To access the departmental contact information for your site, click on your folder, then click the Edit tab.

Publishing

Submitting a page only saves it in Cascade Server – it does not make it live on the SNC web site. In order to make pages live, you must publish them. Any time you make a change to your folder or page(s) in Cascade Server, you must republish all effected pages in order for the change to be live.

Live web site vs. test web site

Pages can be published to the test web site (wwwtest.snc.edu), which is only accessible from on campus to those who know the address, or to the live web site (www.snc.edu), which is available to the whole world. You may want to publish your pages to the test web site and view them there first before publishing them to the live web site. However, if you make only minor edits, you may choose to publish directly to the live web site.

How to publish

1. To publish one file, click on it in the column on the left, then click the Publish tab.
2. Under Destination, choose whether you're publishing to the live web site or the test web site. Both sites are checked by default, so you need to uncheck the "snc.edu/live web site" box if you're not ready to make the page live, or the "snc.edu/test web site" box if you're publishing directly to the live site.
3. Leave the "Generate a publish report message" box checked and click the Submit button.
4. To publish more than one file at the same time* to the live site only, click on the folder, then on the right side, check the boxes next to the files you wish to publish. At the bottom of the file list, from the "With Selected:" drop-down menu, choose Publish. When it asks "Are you sure you want to publish these # assets?", click Submit. Note that this method publishes to the live site *only*.
*Please do not publish your entire folder, as that creates a lot of unnecessary extra work for our servers.
5. If you published to the test web site, preview your page by going to <http://wwwtest.snc.edu/yourfolder/>.

When to re-publish pages

Whenever you change *anything* that affects the navigation menu, Cascade Server will automatically update all of the necessary pages, but then **you must re-publish all of the pages** containing that navigation.



Be sure to re-publish all of the affected pages when you:

- add a page to the navigation menu
- delete a page that was on the navigation menu
- change the Display Name of a page on the navigation menu
- change the order of items on the navigation menu

Broken links

In Cascade Server, when you save and publish pages, you will be notified of broken links to files within your Cascade folder. At times, links to other areas may be reported as broken even though they will actually work once published to the live web site. It may be hard for you to determine which links are this type, and which actually contain errors that must be fixed. Separate from Cascade, broken link reports are generated on the server every weekday and sent to the departmental e-mail address (e.g., dining@snc.edu). Make sure that whoever receives your departmental e-mail forwards those broken link reports to you. Cascade Server does not check external links (those to non-SNC sites), but the broken link reports do.

Assistance and questions

If you have any questions or need more information, contact the Help Desk at 920-403-HELP (4357) or helpdesk@snc.edu. The Help Desk is for St. Norbert College students and employees only.