Cascade Server

Level II
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Chapter 1 – Introduction

This handout assumes you feel comfortable working within the Cascade Server environment and have mastered the basics. If you need assistance with the basics, the Technology Learning Centre offers Cascade Level 1 training which includes the following topics:

- Planning information
- Cascade Server interface introduction
- U of R template overview
- WYSIWYG introduction
- Creating new pages
- Uploading Files
- Predefined Events folder
- Predefined Faculty & Staff folder
- Use & Folder Quick links
- Contact forms
- Publishing Options
Chapter 2 – The Dashboard

The Home Area Dashboard is the welcome screen for all users upon logging into Cascade. It comes equipped with an Asset Tree navigation menu for easy access to all home area assets, a top menu bar containing tools and other resources, a main dashboard content area which hosts a number of useful high level views of the system and a Site selection dropdown for quick navigation between Sites. There are several useful widgets that can be configured to your needs.

1. Messages Tab

The most common messages to be received are published report messages. These messages detail successful site publishing, failed publishing and broken link reporting.
2. **Workflows Tab**

When creating web content (a page, file, image, etc.), a workflow is a series of ordered steps that the content must go through to be quality-checked, and either approved, modified, or disapproved by the appropriate user (an approver) before being publish-ready.

3. **Locked Assets Tab**

A user may manually "check-out" an asset that he/she has 'write' access to. This will prevent other users from making edits to the asset as long as the lock exists. However, other users will be able to create drafts of the current version.

From the "checked-out" state, a user can "check-in" the changes (which finalizes the edit), send the changes into workflow, or break the lock and discard the changes. Users that meet the requirements (see Technical section below) can break the locks of other users. A user can always break their own locks.

4. **Draft Tab**

The Save As Draft feature allows multiple users to save drafts of assets that they are editing in order to return later to finalize changes. Drafts will be saved automatically every 10 seconds as updates are made to form field values. Changes made to text fields are saved when a user un-focuses from that field. However, changes made to WYSIWYG fields and advanced editing fields (e.g. Format editing) are recognized as soon as any modifications are made.

5. **Stale Content Tab**

The Stale Content tab contains user-specific filter settings that determines stale content by review date or last updated date. These settings apply to both the Stale Content tab and the graphical summary on the Dashboard Overview.

**Needs Review**

Each Asset can have a review date set to remind you to review and update the page.

**Note:** The Needs Review view only considers content with review dates set. The content can be limited to review dates with a set number of days from today.

1. Click on the Asset you would like to set a Review Date for.
2. Click the Edit tab, then click Metadata.
3. Use the calendar to set a Review Date.
4. To view all content to be reviewed, click Home then click the Stale Content Tab or Needs Review from the dashboard.
**Last Updated**
This view lists all assets that were updated more than a specified number of days ago.

1. Click Home to go to the Dashboard.
2. Click on the Stale Content Tab or click Last Updated from the stale content widget.
3. Enter a specified number of days and click Refresh (Ex: 120 days).

**Schedule Review from the Stale Content Tab**
While browsing stale content, items can be scheduled for review sometime in the future using the Schedule Review action. This sets the Review Date metadata field on the asset.

1. Click the Schedule Review button or select multiple items and select “Schedule Review” from the “With Selected” dropdown at the bottom of the page. The Schedule Review Date dialog will open.
2. Select a date for future review. Options include 1 month, 3 months, 1 year or a specific date.
3. Click “Submit” to schedule the item(s) for future review. Modifying an item’s review date does not change the item’s last modified date.

6. **Recycle Bin Tab**

All Home Area Assets (Pages, Files, Folders, Blocks, Formats, Templates, and External Links) are sent to the Recycle Bin when deleted. Once in the Recycle Bin, the assets can be permanently deleted or restored to their original location. The Recycle Bin retains deleted files for 15 days and allows them to be restored within that period.

**To restore deleted files:**

1. Click the green Restore button in the Actions column.
Chapter 3 – WYSIWYG

1. **Using Anchors**

An anchor is a hyperlink that creates a shortcut on your page by sending your reader to another section of the same web page. However, they should not replace good content practices; if a page is longer than three screenfuls, break it into more than one page.

**To add an anchor:**

1. While in the WYSIWYG, select the text you want to anchor.
2. Select the anchor icon.
3. Insert Anchor name. Example: banneraccess
4. Select Insert.
5. An anchor icon will appear beside the text.

**To hyperlink to an anchor:**

1. While in the WYSIWYG, select the text you want to link to.
2. Select the hyperlink icon. If linking to an alternate page, choose the link and define location of desired page.
3. Select Internal and type the Anchor name.
4. Select Insert.

Note: Anchors are case sensitive.

Note: [top] is a preset hyperlink for anchors which will take the reader to the top of the page.
Chapter 4 Zip Archive

A zip archive is a file that contains other files packaged together. Cascade makes it easy for users to upload a new Zip Archive. For example, you may have multiple PDF’s to upload to your site. Cascade will unpack the files in the parent folder you choose.

1. Creating a Zip File

To compress a file or folder:
1. Right-click the files, point to Send To and then click Compressed (zipped) Folder.
2. Locate the file or folder that you want to compress.
3. A new compressed folder is created. To rename it, right-click the folder, select Rename and then type the new name.

2. Uploading a Zip File

To upload a zipped file: drag and drop
1. Select Tools, Zip Archive in the top navigation bar.
2. Select the Placement folder. It is recommended you store files in your assets, docs or images folder.
3. Drag and drop your file into the upload box.
4. Submit.

To upload a zipped file: browse
1. Select Tools, Zip Archive in the top navigation bar.
2. Select the Placement folder. It is recommended you store files in your assets, docs or images folder.
4. In the File Upload dialogue box, find the file and select open.
5. Submit.
Chapter 5  Directories & External Links

1. **Creating a Directory**

Directories are used to create sub-menus within the left navigation on page templates. Directories have an arrow to indicate a sub-menu exists. Directories are automatically created by the way files are organized. Essentially they are subsections in your site and you are creating a folder within a folder in your website file structure. Remember, each folder should have a landing page which will be named index.

**Note:** All folders in the Base may appear in the Top Navigation. However, when folders move from the Base, they no longer appear in the Top Navigation.

To create a directory

1. Select the Base Folder.
2. Open the New menu/Defaults/Folder.
3. Enter the system name and display name.
4. Submit.

**Note:** You will also need to create an index page for the new folder.

To insert an external link:

1. Pick file where link is to be located.
2. Enter the system and display names.
3. Enter the link.
4. Submit.
Chapter 6 Un-publishing & Publishing

There may be times when you do not want to use a folder in your site or you want to develop the folder and its content before making the information visible. The following steps will keep a folder in Cascade from being published to the production destination where the public can see it.

Cascade automatically unpublishes the page when you make any changes (ie. Move, rename, etc).

1. **To change the publish settings:**
   1. Select the publish tab of the folder.
   2. Uncheck the Publish checkbox.
   3. Submit.

2. **To edit the folder settings:**
   1. Select the edit tab of the folder.
   2. Remove from Navigation.
   3. Uncheck the Publish checkbox.
   4. Submit.

3. **To publish a whole website:**
   1. Select the Base Folder in the folder list.
   2. Then, select the Publish tab.
   3. Submit.
4. To publish a single page:

1. Select the page.
2. Select the publish tab.
3. Submit.
   OR
1. In the base folder, hover your mouse over the page to be published.
2. Click on the down arrow next to the page.
3. Select publish.
4. Submit.
Chapter 7 Video

1. Using Embed Code

Embed code is used for embedding in a web page video and other rich media content from service hosts such as Google Maps, Flickr, and YouTube. These sites provide easy-to-use code that can be added to your pages. For example, you can create a Google map showing your office location and then embed a copy within your site.

To add embed code:

1. Copy the embed code from the third-party tool. The code is usually under the ‘Share’ button (Flickr, YouTube, and Google Maps).
2. While in the WYSIWYG, select the HTML icon.
3. Paste the code in the desired position.
4. Select Insert.
5. Preview the page in a browser to ensure the embed code works. Not all embed code is compatible with the Cascade Server.
Chapter 8 Banner Images

The U of R Templates have a banner area at the top for images which appear on site pages. Each department may add or delete the images that appear. Please contact AV Services for help with image selection and sizing. Users may also choose to create their own images and use a third party program like ‘Microsoft Office Picture Manager’ to size them (please see the Quicksheet on the TLC website). Below is an image sizing chart.

<table>
<thead>
<tr>
<th>Template</th>
<th>Image Size</th>
<th>Recommended Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1 (Home Page)</td>
<td>800 pixels by 160 pixels</td>
<td>72 dpi</td>
</tr>
<tr>
<td>Level 2 (Secondary Pages)</td>
<td>800 pixels by 135 pixels</td>
<td>72 dpi</td>
</tr>
<tr>
<td>Level 3 (Third Level Pages)</td>
<td>800 pixels by 95 pixels - 3 images (single image is built from three smaller images; each is 260 pixels wide with 10 pixels white space between them)</td>
<td>72 dpi</td>
</tr>
<tr>
<td>Faculty &amp; Staff Bio Pages</td>
<td>150 pixels by 100 pixels</td>
<td>72 dpi</td>
</tr>
</tbody>
</table>

1. Cascade Picture Manager

Images can also be resized and cropped in Cascade. The Cascade picture manager is helpful for cropping or resizing floating images within the content of your site.

To resize a picture:
1. Navigate to the picture within Cascade (usually stored in the images folder).
2. Select the picture and click on the Edit tab.
3. Change either the width or height of the picture (note – the image ratio is locked so the picture will not become distorted).
4. Click Submit at the bottom of the page to save your changes.

To crop a picture:
1. Navigate to the picture within Cascade (usually stored in the images folder).
2. Select the picture and click on the Edit tab.
3. Using your curser, highlight the area you would like to crop.
4. Click the Crop Selection button on the tool bar.
5. Click Submit at the bottom of the page to save your changes.
Chapter 9 Custom Tables

1. Inserting a Table

Tables can be used to organize content on a page. Cascade has predefined Classes that can be used to control the content within the table and the location of the table within in the content.

To insert a table:

1. While in the WYSIWYG, select the location for the image.
2. Select the table icon.
3. Enter the columns and rows needed.
4. Select Center, Left or Right from the Alignment drop down box.
5. Select the Class – These classes have been created to work with the University of Regina templates. normalTable would be a table without styling and formatting.
6. Select Insert.
2. **Modifying a Table**

To modify a table:
1. Click somewhere in the table.
2. Table options appear which allow deleting, adding, and accessing table properties.

![Table Options](image)

3. **Odd-Row Table Class**

To modify a table to have darkened odd rows:
1. While in the WYSIWYG, select the location for the image.
2. Select the table icon.
3. Enter the columns and rows needed.
4. Select Center, Left or Right from the Alignment drop down box.
5. Select the Class – value.
6. Type “zebra”.
7. Select Insert.

![Odd Row Table](image)

4. **Header Rows or Columns**

To bold rows or columns:
1. Highlight the cells to be bolded.
2. Select the style from the dropdown menu to the desired heading type.

![Header Rows or Columns](image)
5. **Inserting Floating Image with Caption**

To insert an image using tables:

1. While in the WYSIWYG, select the location for the image.
2. Select the table icon.
3. Select 1 column and 2 rows if you would like to include an image caption.
4. Under Class, select ‘imgTableRight’ or imgTableLeft’ to float images to the right or left and Insert.

![Insert/Modify table]

5. A small shaded table (two cells) appears in the WYSIWYG main content area. Follow the instructions below to add an image to the first table cell and type an image caption in the second table cell.

6. Select the image icon:
   a. For internal images, select the orange icon to browse within your site.
   b. For external images, type the URL including the http://
   c. Select Alternative Text and enter a brief description of the image. This text appears when a mouse hovers over the image. Screen readers also read the text.
   d. Set a Width/Height in pixels. Depending on the site design, it is suggested to keep image size below 600 pixels W x 400 pixels H and file size less than 100K.
   e. Select Insert.

**Note:** After creating the table and entering content, right-click on the cell with the text/image appearing in the center, and choose "Cell/Table Cell Properties" and then choose "Align Top".
Chapter 10 Picture Gallery

There is a Picture Gallery template available in Cascade upon request. This allows users to show pictures in a photo gallery format.

If you would like to use the Picture Gallery template, please enter a FootPrints ticket at http://www.uregina.ca/is/forms/ticket.html.

Note: Once requested, a Gallery folder will appear in the base folder list. The templates allows for text to be added, using the WISIWIG (e.g. brief description of the photo collection). Limit the amount of text used as it makes the page very wide and not easily readable.

To add photos:
1. Click on the Gallery folder.
2. Then, select New, Defaults, File.
3. Leave both the System Name and Display name as File.
4. Choose ‘Yes’ or ‘No’ to include the file in Navigation.
6. Once found, select open.
7. Submit.
Chapter 11  Getting Help

Please submit any requests for assistance, or actions for an IT issue to the through a footprints ticket at http://www.uregina.ca/is/forms/ticket.html.

For more information on website guidelines, visit External Relations – Communications http://www.uregina.ca/external/communications/index.html.
Chapter 12 Copyright

The University of Regina has Copyright information posted on their website (http://www.uregina.ca/copyright/worldwide_web_multimedia.htm) which states:

“In general, it is best to consider putting material on a website the same as publishing and thus and thus following the same kinds of guidelines that apply to publishing printed material. Unfortunately, no single collective exists that provides easy access and permissions to the wide variety of materials used on websites. It is thus necessary to contact the rights holder to clear rights for the use of text, images, sound and moving images used in websites or other forms of online distribution.

Sometimes this can be easily accomplished, but often rights holders are extremely nervous about granting such rights because of the ease with which the digital versions may be copied and altered. It also may be difficult to track down the rights holder with digital rights.

Do not assume that because you have encountered material on the web, that it is freely available for copying and use on your website.

If you wish to copy excerpts of published works to a website, contacting the publisher is the most direct approach. In most cases, the publisher will be looking for the following information:

- Publication Title
- Author
- ISBN
- Page Numbers to be Copied
- Total Number of Pages to be Copied
- Purpose
- Course Name
- Number of Students in the Course
- Will the Site be Password Protected?
- Is the Publication a Required Text in the Course?
- Period of Time Course Site Will Operate

Access Copyright does provide a digital licensing service for published works at http://www.accesscopyright.ca/licenses.asp?a=10

In addition, some publishers have online permission request forms. For others, it is necessary to contact a sales representative by email or phone.”

Another way that you may avoid copyright issues is to use creative commons material. For more information about creative commons and its use visit: http://creativecommons.ca/

For general inquiries or specific questions concerning copyright, contact Christina Winter, Copyright Officer, at christina.winter@uregina.ca or 306-585-4642.