

# Site Owners: Cascade Basics

May 2017

## Logging In & Your Site

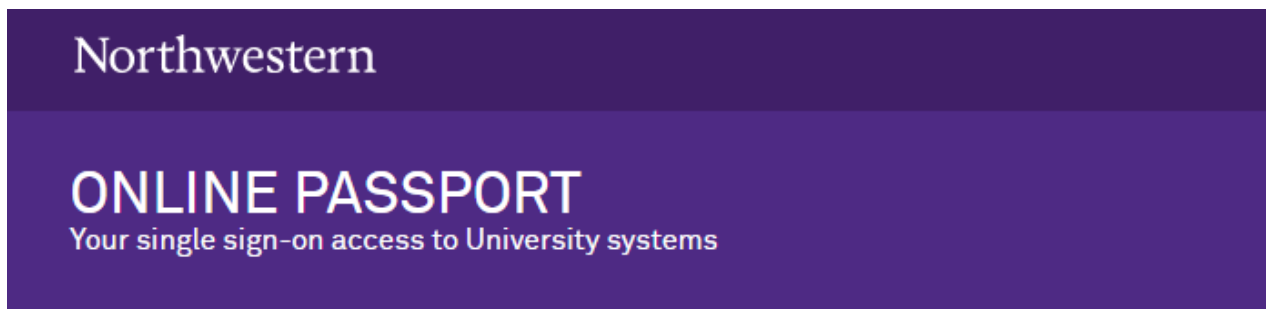
### Logging In

Open a browser and enter the following URL (or click this link):

<http://mordac.itcs.northwestern.edu/> OR <http://www.northwestern.edu/cms/>

You will be redirected to the NU Online Passport Single Sign-On page.

Enter your NetID and password. Then press “Enter” or click “Log In.”



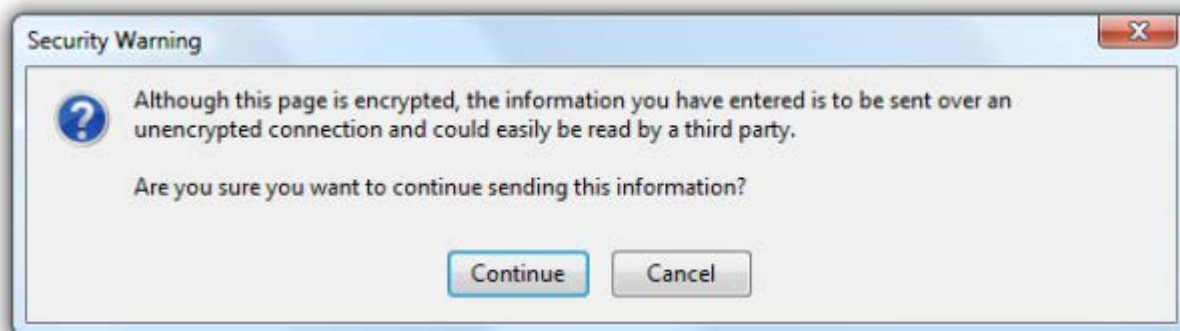
User Name:

Password:

NetID Password

**LOG IN**

If a security warning pops up, click “Continue.”

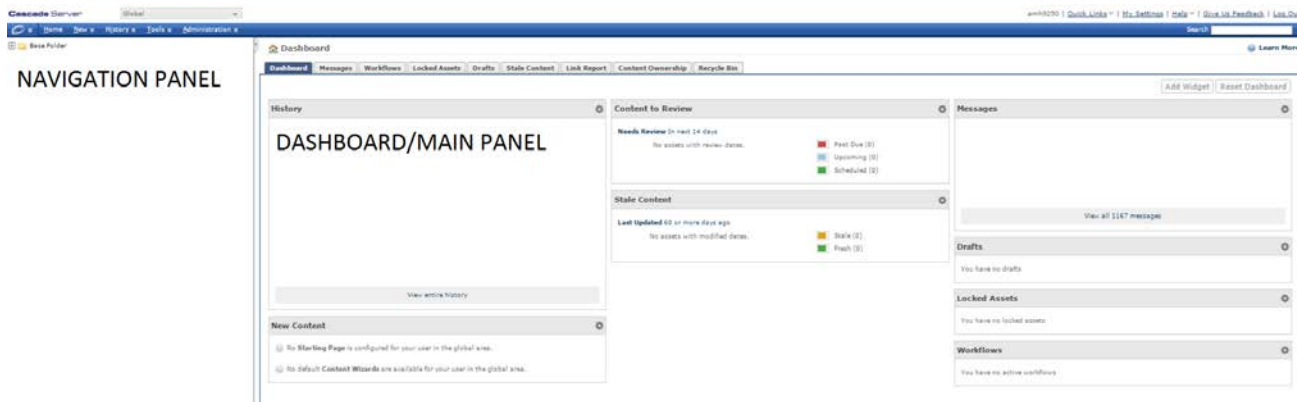


## Browsers

Cascade users should work in Firefox or Chrome for best results.

## The Home Screen

The first thing you'll see upon logging in is the home screen, which serves as a sort of home base for your work while logged into Cascade.

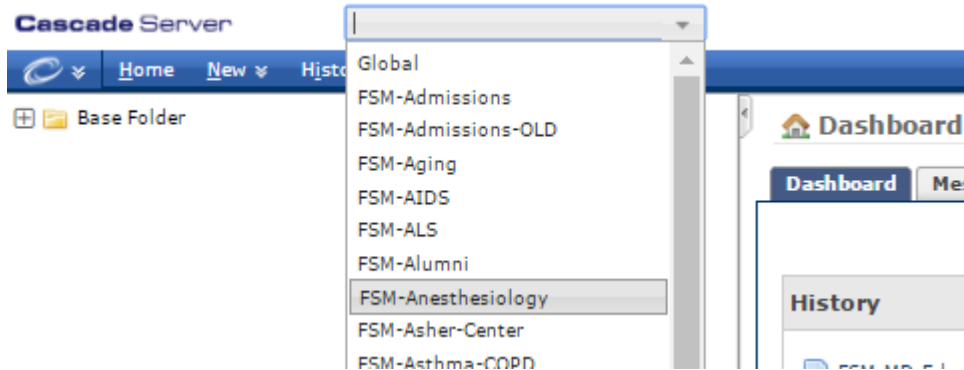


The Home Screen consists of three main areas:

- The **navigation panel**, which runs along the left side, is used to locate and select assets.
- The **toolbar**, which runs across the top of the screen, allows you to perform a set of actions, such as creating an asset.
- The **dashboard/main** panel, which takes up the majority of the screen, changes according to the task you are performing.

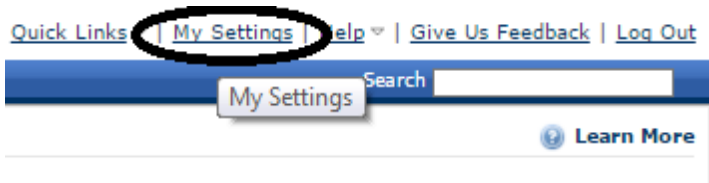
## Select Your Site

You'll notice a drop-down menu at the top of your screen, toward the left. Clicking it reveals all of Feinberg's sites hosted in Cascade; please note, however, that you'll only be able to edit the Feinberg site for which you've been given permission. The menu displays "Global" by default; use it to select the Feinberg website you want to update.



## Set Your Default Website

With few exceptions, most Cascade users spend most or all of their time working on the same website. If this is the case for you, it's possible to select a default website so you won't have to select your site every time you log in.

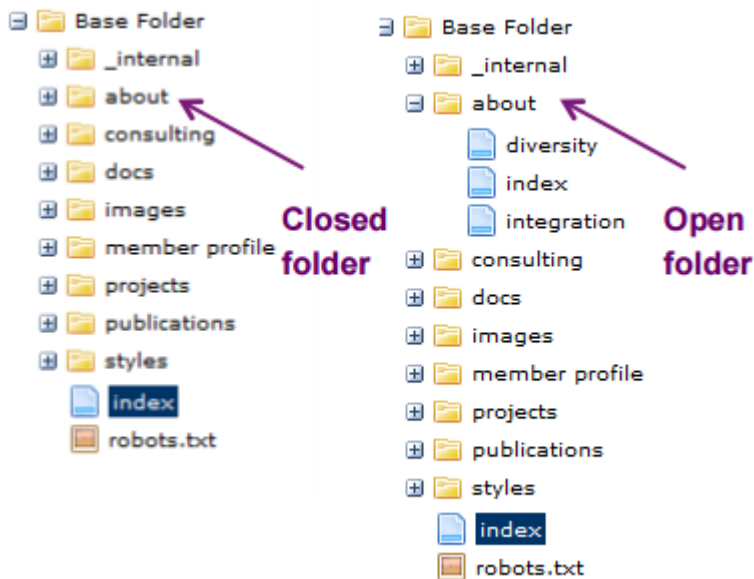


To set your default site:

1. Click "My Settings" near the top right corner of your browser window.
2. Click the link next to "Default Site," then select your preferred site from the left panel of the window that opens.
3. Click "Submit." Your changes will be saved.

## The Navigation Panel

The navigation panel uses the tree structure that will be familiar to any user of Windows: A listing of folders is visible, and the user clicks on the small “+” next to each folder to view its contents.



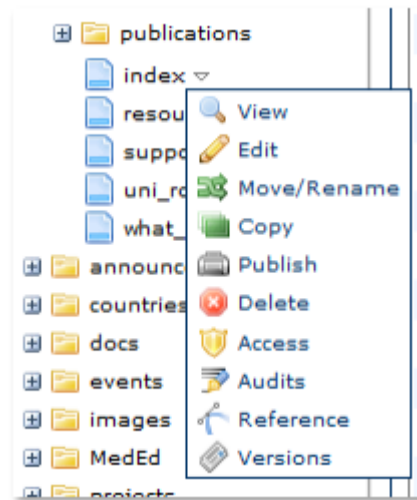
Your site contains a Base Folder, which is where all its contents should be placed, including any new content you create.

To begin browsing your site in Cascade, click on a folder in the navigation panel 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.

Clicking the name of a page in the folder, such as “index,” will bring up a preview of the web page in the main system window, just as it would appear online.

## Context Menu

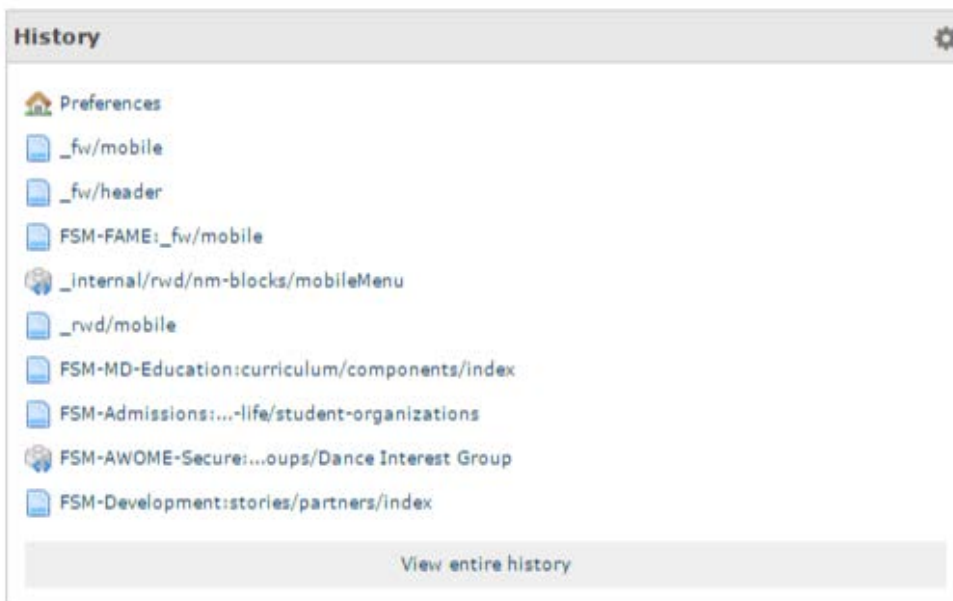
Move your mouse over a folder or page, and you will see a small arrow on the right side of the word. When you click on it, a context menu will appear. The menu presents links to specific asset tabs for faster navigation.



## Recent History

Often, as you're working within the system, you'll want an easy way to return to content you were working on earlier. The history section lets you see a list of your most recently viewed or edited assets.

Recent history is displayed on the dashboard; you can also view it by clicking the history button, located in the toolbar. Your history is cleared each time you log out of the system, so you'll only see assets that you've viewed during the current session.



## Folders & Navigation

### Creating Content

Building a website in Cascade starts with creating a folder structure: A collection of folders containing specifically arranged assets. Cascade takes this structure, applies design templates to it and generates your website.

As you build your site in Cascade, you'll work with folders and files (PDFs, Word documents, images, text files and web pages) extensively.

Before you learn how to create and manage folders, it's important to understand how Cascade uses the information you provide when creating and modifying them.

### Folders and Dynamic Navigation

Your site's navigation is built from the structure and order of the folders within its main directory folder (Base Folder) and the subfolders contained within.

This type of navigation is called dynamic navigation because it's automatically generated and updated by how you build your site's folder structure.

The text that appears in the top navigation and footer links depends on what you enter into the Display Name field.

## Navigation

This example shows the left navigation of About Feinberg section of the website. The order of the folders in Cascade determined what order the navigation is displayed in.

About Feinberg

- Office of the Dean
- Biography
- Dean's Media
- Photo Gallery
- ▶ Welcome from the Dean
- Notable Faculty and Alumni
- Our History
- Facts and Figures
- Medical School Event Calendar
- Contact Us

## Welcome from the Dean

Name	Order
..	
index	1
dean	2
notable	3
history	4
facts	5
events	6
contact	7

In biomedical research, education and clinical care, we will continue advancing our commitment to the highest quality of care for our patients. Indeed, the quality of our healthcare delivery is among the highest in the country. At Ann and Robert H. Lurie Children's Hospital of Chicago and the Shirley Ryan AbilityLab, we are driving forward with innovative solutions and partnerships. But how can we further advance our commitment to the highest quality of care for our patients? To address this question, we have achieved new alignment with our health

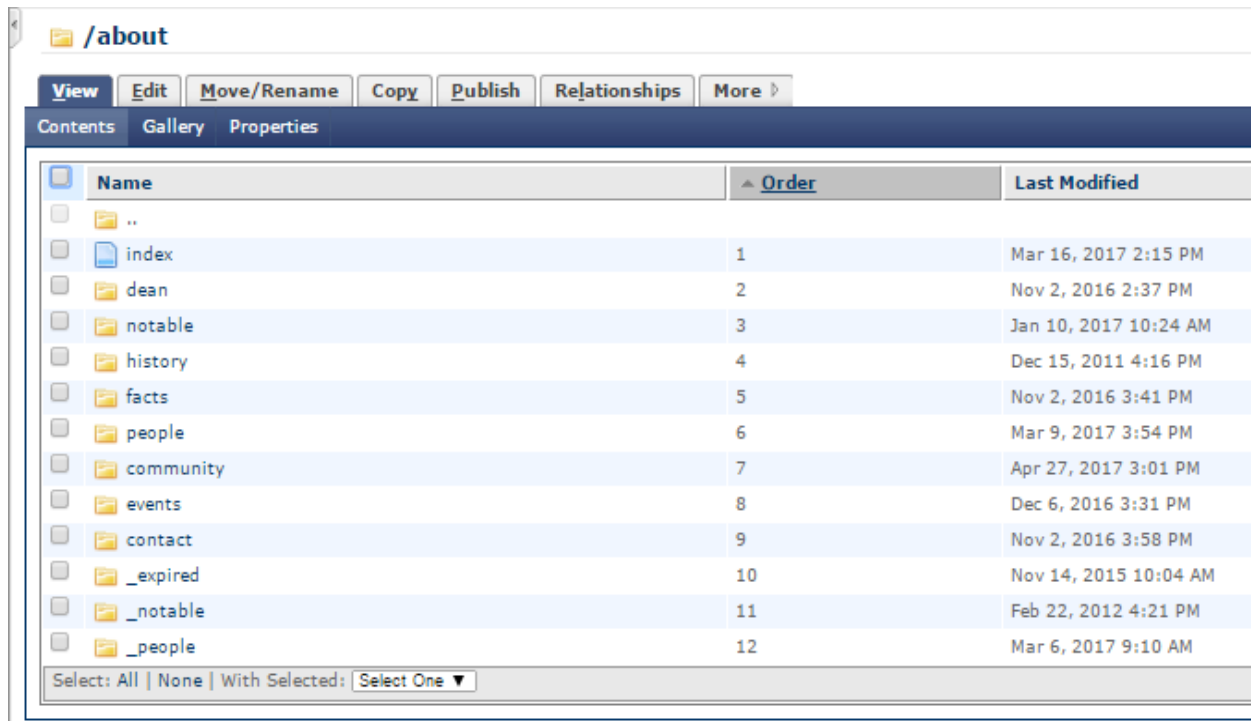
The same holds true for the top and footer navigation.

## Folder Order

In this example, we'll be changing the top navigation in the main directory of your site.

1. In the navigation panel, click on the Base Folder of your site. (Click the folder link, not the "+" sign next to it.)
2. Click the column header marked "Order." The assets should reorder from lowest to highest. If they don't, click "Order" again to reverse the sort order. Note that this sorting is necessary for any reordering to work.





3. Click and drag each folder/file to the desired position, or use the arrows at right to move them up or down in the order. Your changes will be saved automatically when you navigate away from the folder.

In order for these changes to take place on your live or development site, you must republish the folder you've reordered.

## Creating Folders

Since Cascade generates your site's navigation from folders and their names, it's important to name them properly. This begins when you create a folder.

1. Navigate to the folder where you want to create a subfolder. For this example, we'll create a folder within the "images" folder.
2. In the menu bar, click "New" and then click "Folder."
3. Enter the folder name in "System Name" field. Use only letters and numbers. Do not include spaces; put dashes between the words instead

## How Do I Hide an Asset?

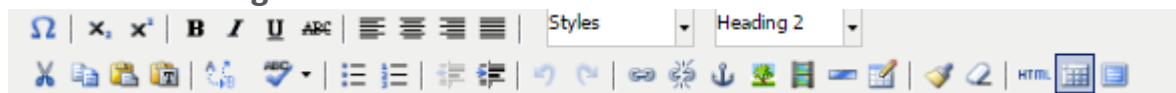
To keep a Cascade asset from appearing in the left navigation of your site:

1. Open the asset in Cascade.
2. Remove any text in the “Display Name” field, leaving it empty.
3. Click the “Metadata” tab, and look for a drop-down menu next to the words “Show page in navigation?” Select “No.” Save the page.
4. Re-publish the entire directory in which your asset is placed. This will update your site’s left navigation.

After publishing, you may need to refresh your browser or clear your cache to see the updated page.

## Editing Existing Pages

### Basic Formatting



Formatting text as bold, italic, underlined, subscript, superscript and setting its alignment to left, right or justified, works the same in Cascade as it does in any word processor: Simply select the appropriate text, then apply the formatting you want it to have.

When the editor is blank, the format drop-down menu will just say “Format.” To make sure the text automatically gets formatted to the “Paragraph” format, hit Enter before typing anything (or select the format Paragraph in the drop-down menu). If you do not do this, the text you type will display larger than normal.

Cascade is currently configured to remove the “centered” formatting available in the editor.

### Headings and Subheadings

To create a heading or subheading in Cascade, simply highlight the text you wish to use as a header, then, in the Cascade editor window, click the “Format” drop-down menu and select Heading 1, Heading 2, or Heading 3. The importance of a heading descends as its number ascends. Information used as a Heading 1 should be more important than that of a Heading 2 or 3.

### **Use Headings and Subheadings Frequently**

Web usability studies have repeatedly shown that users scan web pages, rather than setting out to read them top to bottom, as one would a textbook or novel. This means that concise copy and frequent (but judicious) use of subheadings is vital to making your pages useful to your readers.

### **Improves Search Results**

Google — and thus our internal search engine, which is supplied by Google and uses the same search algorithms — notes information contained in header tags and gives more weight in search results to pages containing search terms in header tags.

### **Build ADA-compliant pages**

Screen readers used by blind people detect the HTML codes that indicate headers and pay more attention to them than they do to ordinary paragraph copy — even if paragraph copy is set to bold or italic.

### **Copying & Pasting**

In maintaining a Cascade website, it's highly likely you'll frequently be copying and pasting content from Microsoft Word documents and Adobe PDF files. Keep these notes in mind.

#### **Pasting from Word**

Using the Paste function in Cascade automatically removes the superfluous code that is often a byproduct of pasting from Word — code that could interfere with the formatting of many web pages.

Reduce the time you spend formatting text in Cascade by using the corresponding functions in Word — nearly all of which translate seamlessly from Word to Cascade. These types of formatting carry over from Word to Cascade during the cut-and-paste process.

- *Headings:* The Heading 1, Heading 2 and Heading 3 formats from Word translate into the correct corresponding HTML header tags in Cascade.
- *Basic formatting:* Bold and italic formatting translates perfectly.
- *Links:* Any links to external websites made in Word will remain intact and functional when pasted into Cascade. However, users should not create internal links (links between pages of the same website) in Word. Create them after pasting your copy from Word. Since Word doesn't have the ability to specify whether a link opens in a new window or the same window, you'll have to configure this after pasting your text into Cascade.
- *Link titles:* (called "tool tips" in Word) do translate from Word to Cascade, and must be filled in to meet ADA accessibility standards.
- *Email links:* As with web links, these translate perfectly.

- *Bulleted and numbered lists:* These cause no problems, though please note that heavily nested lists often do not translate successfully.

### Pasting from PDFs

Unfortunately for Cascade users, text copied and pasted from PDF files does not translate well in terms of formatting. Copying and pasting an entire PDF document more or less guarantees you a colossal headache. Formatting, links and paragraph returns do not carry over.

If you need to copy and paste from a PDF, please follow these steps:

1. Open a PDF.
2. Select all (Ctrl + A); copy (Ctrl + C).
3. Windows Users: Open Notepad (Start Menu > Programs > Accessories) and create a new document. Mac Users: Open a new TextEdit document, go to the Format menu, and select "Make Plain Text."
4. Paste into Notepad/TextEdit (in Notepad, go to Format > Word Wrap if you want to see more of the document.)
5. In Notepad, select all + copy.
6. Paste it into the Cascade editor.
7. Select all.
8. Select "Paragraph" from the drop-down menu.

You'll now need to reapply all necessary formatting to your content. Unfortunately, there's no quick workaround to this, but ultimately it's easier than removing untold line breaks from your page while in Cascade.

### Inserting & Editing Links

Select the text or image you'd like to link and click the link button.

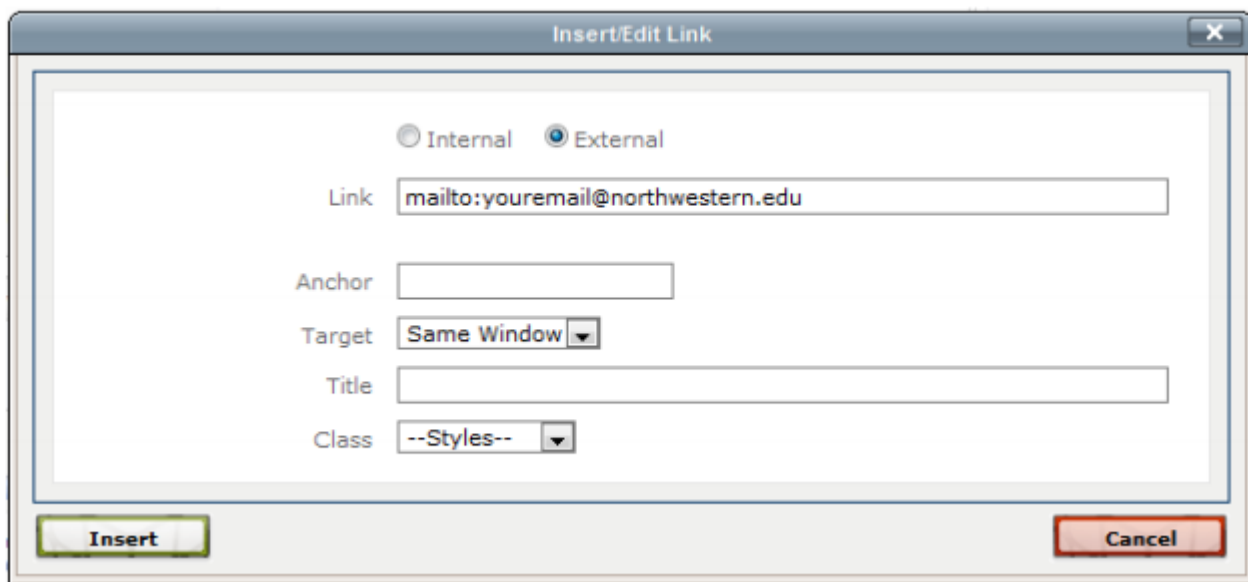
The screenshot shows a dialog box titled "Insert/Edit Link". At the top, there are two radio buttons: "Internal" and "External", with "External" selected. Below this are several input fields: "Link" containing "http://www.northwestern.edu", "Anchor" (empty), "Target" with a dropdown menu set to "Same Window", "Title" containing "Northwestern University Home Page", and "Class" with a dropdown menu set to "--Styles--". At the bottom left is an "Insert" button and at the bottom right is a "Cancel" button.

From there, you will be able to specify the following:

- Whether the link target is an internal page (within your site) or an external URL
- Whether the link will open in the same window or in a new window (default: same window)
- What the link's title will be (appears as the floating "tool tip" when a user hovers over link text)

## Insert an Email Link

Follow the same instructions as inserting a link, and select "External."



The screenshot shows a dialog box titled "Insert/Edit Link". At the top, there are two radio buttons: "Internal" (unselected) and "External" (selected). Below this, there are several input fields and dropdown menus:

- Link:** A text box containing "mailto:youremail@northwestern.edu".
- Anchor:** An empty text box.
- Target:** A dropdown menu with "Same Window" selected.
- Title:** An empty text box.
- Class:** A dropdown menu with "--Styles--" selected.

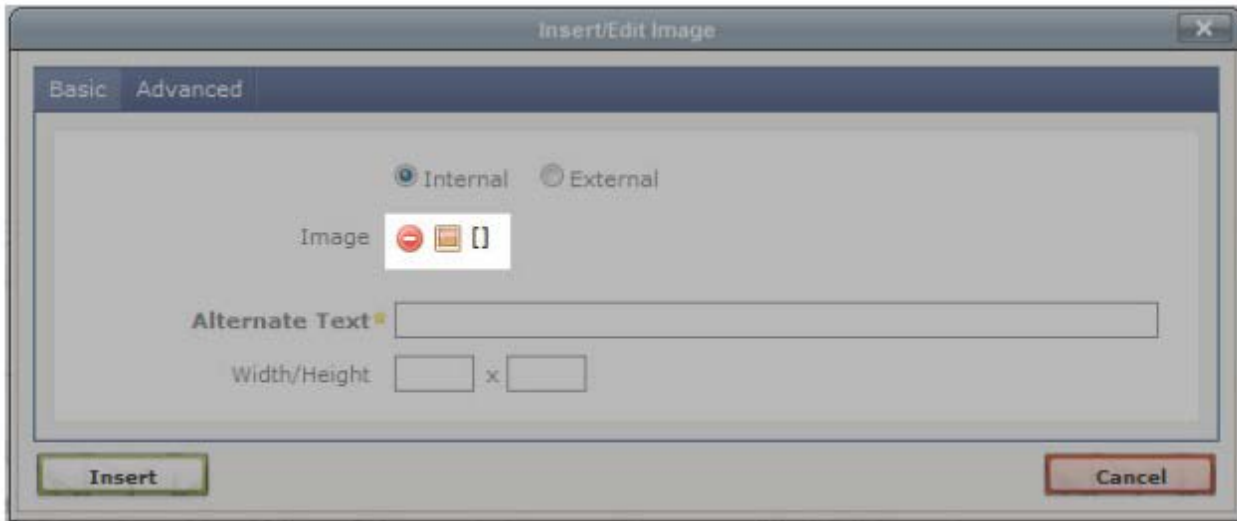
At the bottom of the dialog, there are two buttons: "Insert" (highlighted in green) and "Cancel" (highlighted in red).

Use the following formats for the link:

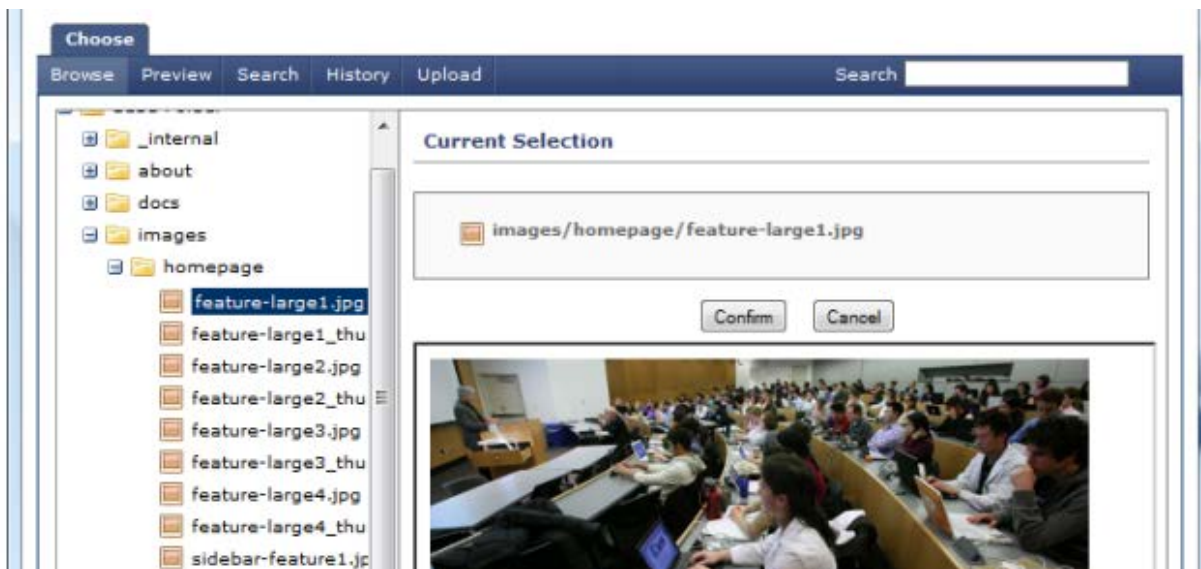
- One Recipient
  - mailto:sample@northwestern.edu
- Multiple Recipients
  - mailto:sample@northwestern.edu,sample2@northwestern.edu
- with Subject
  - mailto:sample@northwestern.edu?subject=Comments from Feedback Form
- with a Copy (CC)
  - mailto:sample@northwestern.edu?cc=sample2@northwestern.edu
- with a Blind Copy (BCC)
  - mailto:sample@northwestern.edu?bcc=sample2@northwestern.edu
- with Subject, a Recipient, CC and BCC
  - mailto:sample@northwestern.edu?subject=Comments from Feedback Form&cc=sample2@northwestern.edu&bcc=sample3@northwestern.edu

## Insert an Image

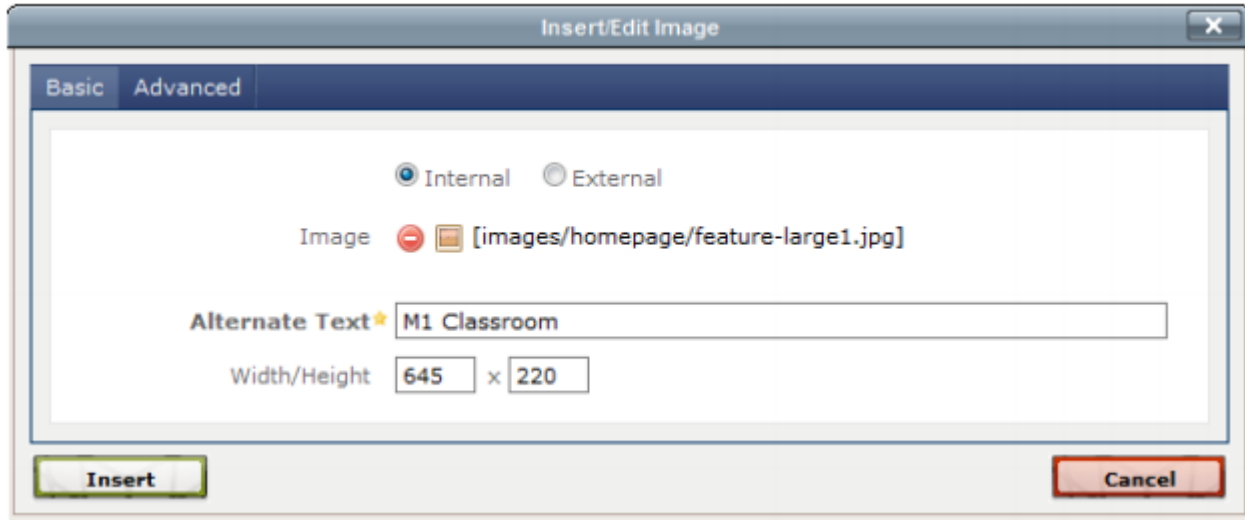
1. Place your cursor in the area of the copy where you want to place an image, and click on the Insert Image icon (the tree picture) in the toolbar.



2. Choose whether you want to create an internal or an external image. An internal image (default option) is a file that is already in the system, or one that you upload. An external image is one that you link to using a URL, though this is discouraged.
3. Next to Image, you will see two icons, a red cancel/delete icon and an image icon. Click on the image icon.



4. Select an image from your images folder (or sub folder) and then click to confirm.



5. Be sure to give the image an “Alternate Text” name describing the image for ADA compliance and search engine optimization purposes, then click on “Insert.”

Use the “Styles” drop-down menu to apply formatting to your images while inside of the WYSIWYG editor. The styles configured on your website will vary somewhat, but in general the following styles should be available:

- fltflt: Applied only to images; aligns image to the left and applies a float area around it to keep text from running into it.
- fltrt: Applied only to images; aligns image to the right and applies a float area around it to keep text from running into it.

## Creating a New Page

### Guidelines for New Content

If you find that there’s information your office or department needs to publish that doesn’t fit with your existing pages, it is, of course, a fine idea to create a new page.

For best results, though, consider the following when updating your content:

- Is there a clearly defined need for this content? If so, what is that need?
- Who will benefit most from this content, and where can I place it so it will be easily found and do the most good? If the answer is somewhere within another part of the site, contact us for help.
- Remember that new pages must be complete, not in progress, when you submit them for publication on the Feinberg websites. Pages that say only “Coming soon!” are not acceptable.

## Creating New Pages

The process of creating a new page is nearly identical to that of creating a new folder or asset:

1. Navigate to the folder where you want to create a new page.
2. In the Menu Bar, click “New > Page.” The “New Page” box will appear in your Main
3. Panel.
4. Enter your page’s system name, display name and title in the appropriate fields, and (if you have it ready) place your page’s content in the main content field.
  - a. System Name: equivalent to the file name. No spaces, use only letters and numbers and use dashes instead of spaces. You do not need to include the file extension index.html.
  - b. Display Name: Used in the site navigation, so keep it short and descriptive.
  - c. Title: Used for page title (at the top of the content area) and also the browser window title. Again, be descriptive and brief.
5. In the Metadata field, select whether you want the page to appear in the left navigation. There are few cases in which a page should not appear in the left navigation; use this function sparingly.
6. Click “Submit.”

Your site will not automatically publish to the live site, you’ll need to manually publish your changes; see below for more information on publishing pages.

## Creating & Uploading Files

To use or link to a photo, PDF, Word document or Excel spreadsheet in Cascade, you’ll first need to upload it to the CMS. By doing this, you’ll be creating what’s called an asset.

### Upload a New Non-Image File

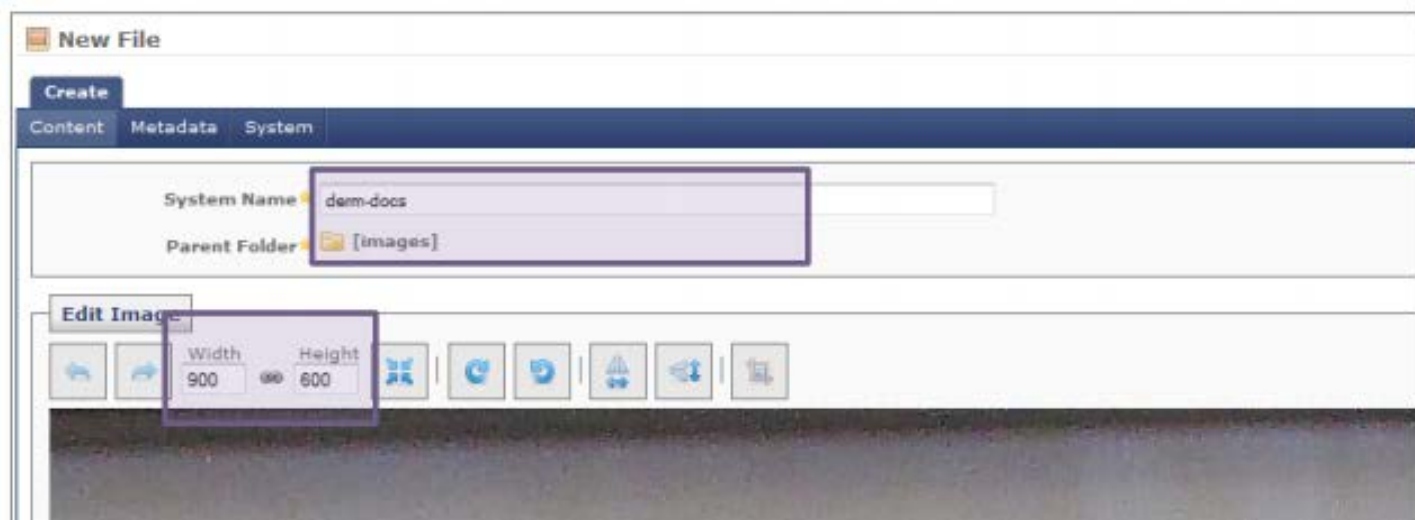
1. In the Menu Bar, select “New > Document” or “New > File.”
2. The main panel will change to the “New File” panel. At the bottom of the area labeled “Data,” you’ll see a field marked “File Upload” with a “Browse” button next to it. Click “Browse.”
3. A file-browsing window will open, allowing you to navigate to and select the file you wish to upload; do so and click OK.
4. On the “System” tab of the “New File” panel:
  - a. Name: Unless you specify a new filename, Cascade will use the original name of the file you’re uploading. As such, you can ignore this field unless you’d like the file to have a different name in Cascade.



- i. However, please remember that Cascade file names cannot include capital letters or spaces. If the original name contains either of these, please give it a new name that substitutes hyphens for spaces.
    - ii. PDF file names must include the extension “.pdf” at the end of their system names in order to work properly in Cascade. If you’re uploading a PDF file without a visible file extension, please remember to append .pdf at the end of the system name.
  - b. Parent Folder: Click this link to specify in which folder the file will be stored. It is strongly recommended that all site users store files in a central or common location — a “docs” folder for Word and PDF files, or an “images” folder for photos.
  - c. Publish: Check this box if it’s a file that will need to be published to the web server.
  - d. Index: Check this box if it’s a file that will need to be included in dynamic navigation menus.
5. Click “Submit” to upload and save your file.

## Upload a New Image File

The process of uploading new image files is similar to that of uploading a new non-image file. However, Cascade’s built-in image editor adds a few very important steps related to resizing images as you upload them.



1. In the menu bar, select “New > Images.”
2. When choosing the destination folder, choose your site’s Images folder rather than its Docs folder.
3. As with non-image files, Cascade will automatically use your photo’s original file name as the system name.

- a. If this file name is non-descriptive, such as “DSC\_20110608-005.jpg,” enter a descriptive system name so you’ll be able to identify the file when browsing your image folder.
  - b. Make sure there are no capital letters or spaces in the file name.
4. If you’re uploading a full-size or similarly large image (e.g., 1500 by 2400 pixels), you must reduce the size of your image by doing the following:
  - a. In the “New File” window, change the dimensions of the longer side of the photo to 900 pixels or fewer.
  - b. If you’re not sure what size your image will be, this allows you to use it at a large size if needed, but at a greatly reduced file size. If the lock icon is showing (as seen above), changing the length of one side will proportionally change the length of the other
5. Click the “Resize” button to resize the photo.
6. Click “Submit.”

## Publishing

Once you’ve made edits to a page, you’ll still click “Submit” at the bottom of the page you’re editing — but you will still need to publish your edited page.

The publishing process is simple.

1. After clicking “Submit,” you should see a green bar at the top of the Cascade window that reads “Edit Successful.” Confirm this is present, then:
  - a. Click the Publish tab at the top of the page preview window, or...
  - b. Choose Publish from the context menu next to the asset in the navigation pane.
2. You’ll see three areas of the screen, where you’ll configure the publishing process for your pages:
  - a. Page Configuration: Refers to the type of page you’re publishing; there is no need to alter this area.
  - b. Destination: This area shows to which servers you’ll be publishing your edits. Two servers should appear, one with the word “dev” in its name (this is your site’s development server, a test server) and another with the word “prod” in its name (this is the live server that’s viewable by the public). If you only want the changes you’re making to show up on the development server (for example, you might want to show someone a set of proposed changes to the live site), make sure only the box next to “dev” is checked. If you want your changes to go live immediately, make sure both boxes are checked.
  - c. Options:
    - i. Generate a publish report message if checked, means that you’ll receive a message within Cascade’s internal messaging system (viewable from your

Dashboard or from the Messages link in the Quick Links menu) confirming that your page was published and what errors, if any, occurred during publication. This is good to have, but not absolutely necessary.

- ii. Publish and Un-publish mean exactly what they seem to: Publish updates the page you've altered on the server, and Un-publish removes the page from the server entirely.
3. Once you've selected the configuration you want, click "Submit" to publish your page. You'll get a confirmation message in a green bar at the top of the page.

**VERY IMPORTANT:** If you've made updates to the order of the navigation in any way — this includes adding a new page, changing the order in which the pages appear or changing the display name of any pages that appear in the left navigation — you must republish the entire folder in which the updated items appear to see those changes reflected on the live site.

To publish a folder, navigate to the folder you want to publish, then follow the steps listed above.

### What to Publish & When

If at all possible, avoid publishing your entire site, for the simple reason that it's not necessary. It also consumes a limited amount of bandwidth in the University's publishing queue.

Even if you've made significant changes to the left navigation throughout your site, it's only necessary to select the folders to which you've made changes and publish them, rather than the numerous additional unseen files that exist throughout your site.

<b>If You Change</b>	<b>Publishing the Following</b>
The display name of a left/top navigation item (or add an item to the left/top navigation)	The folder containing the item
A page, by adding a photo or PDF link to it	The changed page only. (New assets linked to from a page are automatically uploaded when the page is published.)

## Feedback

We appreciate your comments as Cascade user and as a reader of this document. If you would like to contact us with your comments or concerns, please email [medweb@northwestern.edu](mailto:medweb@northwestern.edu).

For more training within Cascade, visit the Office of Communication's website for information on how to attend one of our in-person training sessions.