LOGGING IN

1. To login to Cascade Server, from home or work, open a web browser.
   * We recommend Firefox or Chrome, if you have a choice.

2. Go to this web address: http://cascade.emory.edu

3. You’ll be asked to login, using your usual Emory netid and password.

4. Click Login.

5. The first page you will see in Cascade Server is the Dashboard. Now you have successfully logged in.

NOTE: If you have typed in both username and password correctly, but it gives you an error message, your Cascade account may not have been activated. In which case, send an email to: ecas.comm@emory.edu

RESOURCES:
Need help with a College Standard Template Site?
Email ecas.comm@emory.edu
Emory Standard Template Support Documentation
See http://template.emory.edu/cascade
When you first login, the Dashboard appears. It contains a variety of information in the form of widgets.

The Welcome Back block in the top left corner is the only widget on the page that can’t be removed or rearranged.

- Widgets can be added with the Add Widget button. An explanation of each one appears when you click on Add Widget.
- To rearrange, click on the top portion of the widget and drag and drop the widget.
- To remove, place your cursor on the top right of the widget, and click the “X.”
- To reset your dashboard to the default view, click on Reset Dashboard in the top left.
- Some widgets display site-specific information (e.g. Stale Content) while others display user-specific information (e.g. My Content).
- One of the more important widgets on the dashboard is Notifications. It contains notices/alerts from Cascade on the publishing of your website.
- Remember to get back to the Dashboard by clicking the Cascade symbol in the top left-hand corner.
- The most useful widgets include My Content – which you can use in case you forget what page you were working on, or if you are trying to switch between pages and keep getting lost – and New Content – which will allow you to upload an image or document or create a folder directly without having to access your site’s files first.
- If you have any questions about any additional other tabs, email ecas.comm@emory.edu.
ACCESSING YOUR SITE

To access your site from the Dashboard, click on the Go to a Site box in the top left-hand corner or under the My Sites widget. Alternatively, you may click on a particular asset in the My Content widget or through Search, which will take you to that file within your site.

![Dashboard screenshot with Go to a Site menu]

**Note:** if you have access to more than one site, both will appear in the Go to a Site menu. Your default site will appear first in gray. To set your default site, go to your Name Icon in the top navigation bar, click on Settings, and then pick your site under Default Site. Click submit.

FOLDER TREE

Once in your site, you will see a list of folders, pages and other assets within your site. This is called a Folder Tree.

If you don’t see the Folder Tree at first, click on the on the gray box with the circle and arrow in the left corner to expand it.

![Folder Tree screenshot]
The Folder Tree looks a lot like your File Explorer on a Mac or Windows computer.

↑ To expand a folder in order to see the assets it contains, click on the name of the folder or the folder icon next to the name. To collapse it, click on the folder name again.

↑ Once expanded, you can then expand a subfolder or select a page by clicking on its name.

Sometimes you need to re-order folders and files so that the pages in a section of your site appear in the order of your choosing.

1. In the folder tree, click on the > symbol to the right of the name of the folder you wish to reorder. This will bring up the list of folders and pages within that folder in the right frame of the screen.
2. Then, click on Order.
3. To move a page, left-click on the page’s order number and drag up (or down). Release the mouse button to drop the page into place.
4. a, b, c: Alternatively, check the box next to the page or folder name and move the page using the arrows that appear at the top after having checked the box.

↑ Once you drop a page into place, the navigation order will be updated.

↑ Typically, you will want the ‘index’ page as the first page, this is always the homepage for each folder.

↑ Once the order is changed, you will then need to publish the entire folder/directory in order for it to show correctly on the live site. So, for the example showing in the figure above, you would publish the entire ‘Services’ folder.
ASSETS IN THE FOLDER TREE

An asset is simply a piece of content in Cascade. The four main types of assets you will be working with are:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>![Folder Icon]</td>
<td>Folder</td>
</tr>
<tr>
<td>![Page Icon]</td>
<td>Page</td>
</tr>
<tr>
<td>![Photo or Document Icon]</td>
<td>Photo or Document</td>
</tr>
<tr>
<td>![Block Icon]</td>
<td>Block</td>
</tr>
</tbody>
</table>

Selecting an Asset

To view assets in Cascade, browse through the Folder Tree view, and select an asset by clicking on the asset’s name or the icon beside its name.

Once an asset is selected, you will get a preview of some sort in the main window, depending on what type of asset you selected.

The figure below is a page asset. You can always see the system path of the asset at the top of the page, which is important, because it shows where your asset lives in the system. The System Name also is the basis for the URL on the live site. (e.g. the page in the figure below can be found at http://dev.college.emory.edu/training/help/index.html.)

The next page describes the Asset Functions that are available.
Asset Functions

Once an asset is selected, you can perform various functions or tasks for that asset — such as Edit, Publish, Comments, etc. These functions can be found along the top of your screen (see figure below). Some of the tasks will function the same for each asset, such as Publish. Other functions, such as Edit, provide options based the type of asset: folder, document, image, block or page. Below is an explanation of what each task does.

Function Descriptions

↑ **Edit**: Changes the content of the asset. See “Creating and Editing Pages” section.

↑ **Publish**: Sends content to the live site. Changes will not be seen on the live site unless you publish the asset.

Note: *Component Blocks* found in the ‘Components’ folder, do not need publishing. Rather, you edit the component and then publish the page which the component appears on.

↑ **Comment**: Write a note to yourself or another editor about this asset.

↑ **Details**: Easy access to information about an asset without having to edit the page. Information includes page title, summary (if present), last modified date, last published date and more. You can ignore the “Design Section.”

↑ ••• More: (Continued on next page)
More: (Functions continued from previous page)

- **Move**: Use to move the asset to another location. You may also drag and drop the asset in the folder tree to move it.

- **Rename**: Change the *System Name* of the asset.

- **Copy**: an asset. Useful as a shortcut when creating multiple assets that are similar.

- **Delete**: make sure the box next to **Unpublish Content** is checked. Otherwise the asset will continue to exist on the web server and will come up in search results.

- **Unpublish**: This removes an asset from the live site without deleting it from Cascade. This does not apply to Component Blocks. To remove a component block from a live site, you must edit the page it appears on, remove it from the page, then republish the page without the block.

- **Check-out/Lock**: If multiple users work on the same page in your site, you may want to check out the page while working on it, so that no other user can make changes while you have it checked out. Don’t forget to check it back in!

- **Relationships**: Provides a list of assets that have a relationship to the selected asset. For example, if a photo is placed on a page or pages within your site and you are looking at the Relationship in that photo asset, you will see the page(s) that contain that photo.

- **Versions**: Cascade maintains a full version history on each asset in the system. As changes are made to any asset in the system and **submitted**, Cascade Server keeps track of the changes in separate copies of the asset called Versions. You may activate any version of an asset since its creation.

- **Reference**: Creates a reference that allows assets to be indexed in different folders in the site tree when generating navigation and other dynamic content listings. Useful if you want the same information referenced in multiple locations on your site.

- **Tasks**: Assign yourself or another user a to-do item for the page.

- **Schedule Review**: Schedule a reminder to look at an asset at a set time interval, such as before Fall or Spring semesters.

- **Marked as Review**: Turn off scheduled review.

- **Show Regions**: For developers. Can ignore.

- **Analytics**: Analytics are only available through Google Analytics. Contact ecas.comm@emory.edu, if you would like access to your site’s analytics.

- **Full Screen Preview**: Helpful for viewing your page as it will look on the live site, without having to publish it.

- **Rendering Metrics**: For developers. Can Ignore.

- **Live**: Takes you to the live version of the page. Sometimes, you have to refresh your browser once on the live site in order to see the changes. In rare instances, you may have to clear your browser’s cache to see the changes. If you refresh and clear your cache, it’s possible the system may just be slow to publish.

You may check to see if your publishing job has gone through by clicking on the Hamburger Menu (≡) above the More menu and clicking on Publishing Queue.
Folder Functions vs. Asset Functions

When looking at a folder content view and selecting specific assets to Edit, Copy, Delete, Publish, etc. you should use the icons located just above the folder contents:

![Folder: training-examples](image)

Asset Functions at the top (see image below) target all the folder contents, so you can copy, delete or publish the entire folder.

A good way to think of it is that the functions at the top (Edit, Publish, Comments, More, etc.) will always target the asset named at the top of the page (blue circle).
CREATING AN ASSET

To create a new asset, go into your website and then click Add Content on the top menu. A pop-up window with a menu will be displayed. When adding a new document or creating a new folder, make sure it is in the correct site and placement folder.

Depending on the type of asset, you will receive different prompts for information. However, all assets will require a System Name and Placement Folder. System Names determine the URL of the asset on the live site, so it is important to follow the naming guidelines:

- Use all lowercase letters. Do not use punctuation or special characters.
- Use underscores ( _ ) or hyphens ( - ) in place of spaces. Do not leave spaces in your file names or they will be replaced with “%20”.

www.emory.edu/programs-that-support-undergraduate-research

http://emory.edu/Programs%20that%20Support%20Undergraduate%20Research.html

Below the System Name field is the Placement Folder. This is the location of your page, where it lives in Cascade, and where it will live on the web server when it’s live and is part of the web address. Change the location by clicking on the folder name and browsing to the new location.

It’s not really called a System Name
The name of the field where you input the System Name for an asset will change depending on the type of asset. So the System Name for each of the following types of assets are actually called:
Page – Page Name
Folder – Folder Name
Photo – File Name
Document – File Name
Component – XHTML/Data Definition Block Name
Creating and Submitting a Folder Asset

To create a folder, go to Add Content and choose Navigation Folder. Provide a System (Folder) Name and check to make sure you are in the correct Placement Folder. Then, click Submit in the right top corner of the pop-up window. Once Submit is clicked, the asset is created. Or, you may click cancel if you do not wish to create the folder asset.

Creating and Submitting a Page, Photo, Document or Component Asset

To create any type of asset other than a folder, go to Add Content and choose the type of asset you want to create. The asset will prompt you to first to Save and Preview instead of the Submit. The system will provide you with a preview of the asset first, and then you then may click Submit in the top of the page to create the asset. The file is not saved until you hit Submit.

Submitting Shortcut

1. When creating a page, document, photo or component asset, the system will ask you to save a draft and preview before submitting and thus creating the asset.

2. Once the preview is displayed, click Submit in the top menu to finish creating the asset.

Alternatively, click on the kabob menu (Advanced Submit) and go straight to submit and the file is saved.
FOLDERS

When you want to create a folder, you have three choices:

1. **Folder – Navigation**: This creates an empty folder. Note: If you want this folder to be visible in your site’s navigation, you will have to create a new page within the folder and use “index” as its system name.

2. **Section**: This creates a folder and a section index page within the folder. The index page that is created is a special type of page that gathers all the other pages that you create within that folder and displays them in a grid of links to the pages for that section. It has a couple different display settings, but the function is the same.

3. **Bio Section**: This will create a folder and a bio index page within the folder. The bio index page functions the same as the section index page but links to Bio Pages.

   **Note**: Section and Bio Section folders do not have left navigation displayed on the index page.

**Folder Metadata and Properties**

After choosing the folder type, giving it a *Folder Name*, and choosing its placement folder, you will see additional options below the Placement Folder field. This is the asset’s metadata.

Most of the fields you can ignore, but you may find useful the “Exclude from sub-nav” at the bottom of the pop-up window. Check the boxes “Yes” if you would like to hide the folder from the interior sub-navigation.

Also, at the top of the window is a Properties button. Under the properties button you have two useful options that are checked by default:

- **Include when indexing**: Un-check this folder to remove the folder from all navigation in your site. It will also hide it from Google and other search engines. This can be useful when you want to publish a folder and its contents to provide to a non-Cascade user a link for viewing but are not ready to show a wider audience.

- **Include when publishing**: Un-check this when you are working on an asset that you do not want to go live. Your folder will not go live unless you publish it, but unchecking this box is extra protection against it going accidentally being published.
PAGES

There are several different page types. This document will only provide information about the Basic Page. For more information on the other types, see Interior Pages of the Standard Template Documentation site.

**Interior Basic Page**: Basic pages have fewer options for setup, making it easier and faster for those new to Cascade and the Template, or who have simple content to display.

**Interior Structured Page**: Structured Pages have all of the options Basic Pages do, as well as some extended options to accommodate more complex information structures, such as tabs, accordions, and FAQs, as well as media such as Photo Galleries and Slideshows in the content area.

**Bio Page**: Bio pages offer a structure that organizes and displays biographical data in a common, unified format.

**Bio Index Page**: see Folder section on previous page, item 2, for description and example.

**Section Index Page**: see Folder section on previous page, item 3, for description and example.

**Create and Edit a Basic Page**

1. Create a new **Basic Page**, by going to Add Content>Interior Page>Interior Basic Page.

2. When the pop-window is displayed, it defaults to the Content tab. Begin by filling out the **Page Name** following the guidelines in Creating an Asset section. Make sure it is in the location you want it in.

3. Give the page a **Title**. The Title is the name that will appear as the gold heading at the top of the page, the very top of the browser window on the tab, and is used in searches, such as those by Google.

4. **Summary** and **Description** is often blank. See figure to right for more information.

5. **Thumbnail**. Expand section if needed. Thumbnails are used on section index pages. Used when page is in a section folder.

6. Expand **Main Content** section. This is where most of your information for this page will go. Enter information into the WYSIWYG (see WYSIWYG section for more information).
7. Expand Sidebar section. The Sidebar utilizes Components to highlight information in a pre-formatted, stylized way and are special chunks of content, created outside of the page and then uploaded to the sidebar area.

See the Components Section of the Standard Template documentation for descriptions and examples.

To utilize a component, expand the Sidebar section, select the type of Component you want to use, check “Add to existing Site-wide settings” if not already checked, and select a component block, by clicking on the “Choose Block” box and browsing to the Components folder. If you chose a Callout component, skip the Choose Block and select a Callout Page in the box below.

9. After inputting the page’s content, click on the Metadata tab at the top of the pop-up window. Pages have similar metadata choices as Folders, with a few additions. Here are the most useful fields in this tab:

- The Display Name is how the page will appear in the left navigation. You can also put this in the Alternative Sub-navigation Title. These two fields have the same result. You would do this if your Page Title is redundant or it is too long to neatly fit in the sub-navigation space.
- You can Exclude from Sub-navigation, if you do not want the page to show in the left-navigation.
- Exclude from Parent Section Listing removes it from a Section Index page.
WYSIWYG: OVERVIEW

Cascade Server is built with what’s called a **WYSIWYG** editor, that stands for “What You See Is What You Get”.

> If you are familiar with word processors like Microsoft Word, this WYSIWYG editor has many similar functions, like text formatting, inserting images, tables, spellcheck, and more.

> If you don’t remember what an icon does, simply put your mouse over that button, without clicking, and the function will appear.

> Much like a Microsoft Word document, you can simply type in the text editor the content you’d like to add or replace.

> The WYSIWYG does a lot; however, it is not completely accurate when viewing a page in Cascade, so you must always view a “Preview” of the page before you can be sure it looks correct. You can do this by clicking the **Save and Preview** button at the top of the edit window.

**Note:** To get an even more accurate rendering, after clicking Save and Preview, you may go to the Kabab menu and view the page as a **Full Screen Preview**.
To make links in Cascade, there are 2 types of links you have to choose between:

1. First, **Internal Links** take you to pages or files within your own Cascade site.
2. On the other hand, **External Links** are links to pages or files that are NOT located within your website in Cascade, such as: google.com, your secure web site, or another Emory site.

Linking to anything, whether internal or external, involves highlighting some text or an image and clicking on the chain-link icon.

When you click on the chain-link icon, a new box pops up.

For **Internal links**, you’ll want to check the box next to Internal if it is not already chosen.

Below the check box is the Choose File, Page or Link field that you want to select, so you can browse within your Site for the page or file. Another box will pop up that provides several ways to browse for the page or file.

Once selected, click Choose in the top right corner of the chooser box.

For **External links**, you’ll want to click on the External check box.

Here you will copy and paste the web address into the Link field. See circled field in figure below.

For both types of links, you should also fill in the Target and Title fields.

If you want this file to open in a new window, go to the Target, and select “New Window”.

To add an email link, type “mailto:” and the email address, mailto:college@emory.edu into the Link field.

Note: You may get an alert box after adding a link to the page. There is a new security standard for browsers and "https" will be replacing "http". Not all webservers are configured to use "https" yet so if the URL you are linking to is still “http”, just ignore this message.

Best Practices for Linking

In general you should always choose new window for all external links and PDF files.

Be sure to enter a short Title for the link; this makes it more accessible and increases its rank in Google search results.
WYSIWIG: FORMATS

Within the WYSIWIG menu, there is a set of pre-determined formats that can be used to style content.

![Image of WYSIWIG formats](image)

Note: The standard template includes a CSS file that styles the type – fonts, colors, sizes, etc. This cannot be changed.

Below lists the most frequently used.

**Headings**

Heading styles can be used to break up text and help the user scan the page for the information they need. To the right are the first four heading styles.

Note: This hierarchy of headings is also used by screen readers to impart importance of content to the visually impaired.

**Custom**

*Pull-right, Pull-left.* This is used for photos placed through the WYSIWIG. This places the picture to the right or left of the text and places a margin around the photo, so text is not running up against it. See “Uploading Photos” section for more information on how to add photos.

*Table-plain, Table-striped, Table-bordered.* This is used to stylize tables within the WYSIWIG. Even if you don’t want any stripes or borders, it is good to apply Table-Plain so that it is formatted for mobile.

Note: There is a bug in the current version of Cascade so that when you click on the table in the WYSIWIG and apply a style, the style will not be applied. Rather, you have to click on the table, then click on the word “table” that appears in the line of code at the bottom of the WYSIWIG. When you click on the word, “table” will then be the only word that showing. Now you can apply the table style.
Uploading Images and Documents

There are two ways to upload an image or images. The first way is when you are already within a page or within a block. The second way is to directly upload it a folder and then place it on a page.

↑ No matter which way you choose, it is best to do any edits, such as re-sizing, optimizing, or renaming to a web-friendly name, BEFORE you upload.

Uploading an image when you are already within a page

This way requires the photo to be resized before uploading. You can also only upload one photo at a time using this method.

There are two kinds of places to which you can upload the photo on a page:

1. In a pre-determined field. (e.g. Thumbnail section on a Basic Page) When uploading photos in a predetermined field, it specifies that the photo be a certain height and width. Adding an image of a different size may cause the image to not display as you intended.
   a. To upload, click on the selection field. A pop-up box will appear and you can then choose from a list of recent photos, search or browse for already uploaded photos.
   b. Click Upload in the top menu, to choose a picture from your desktop.
   c. Drag or browse for a photo from your computer into the upload window, make sure it has a web friendly name (if it doesn’t, you can change it in the File Name field). Note: All images must include an extension at the end of their name - .jpg, .png, .gif
   d. Choose the correct placement folder. Note: It is best practice to keep all your images in the Images folder.
   e. Click choose in the upper right corner of the pop-up box. Your photo is now placed in the folder that you chose and uploaded to this part of the page.

2. In the WYSIWIG. Placing a picture in the WYSIWIG does not require the photo to be any particular height or width. For this reason, you may have to experiment with photo size to determine what looks best. We recommend staying under 700 pixels in width.
   a. To upload, put your cursor in the WYSIWIG field, approximately where you would like the photo to appear.
   b. Click on the photo icon in the WYSIWIG menu. A pop-up box will appear.
   c. Check the Internal Image Source box. It’s not best practice to use External Image Sources, as they can end up causing broken images on your site.
   d. Click in the Image Selection field and follow steps c-e in Part 1 above.
   e. Choose ”This is a decorative image, no description needed.” only if the image is used as decoration and does not impart meaning. Screen readers will skip this image when reading. A description is required for all other images.
   f. Add the image description.
   g. The dimensions of the photo will automatically be input for you. Although Cascade allows you to change the information in this box and the size may appear changed within Cascade, it does not work when the page is live.
   h. For class, choose pull-left or pull-right to align your photo within the content. (See WYSIWIG formats section).
Uploading an Image or Document when you are not on a page or in a block

If you choose to upload a photo this way, you have the option to edit it with Cascade’s built-in photo editor. You also have the option of uploading multiple photos at once. Learn more about editing a photo in the “Editing a Photo Section.” Documents cannot be edited within Cascade like photos can.

1. Select folder where you want the photo or document to live
2. Go to your Add Content menu and select Document or Image.
3. Choose your image, confirm File Name and Placement Folder.

Determine and select the folder this file will live in. It is best practice to keep images all in the images folder and documents in the documents folder.

PDFs, and Word or Excel documents will live in a folder called “documents.”

Images, on the other hand, live in a folder called “images.”

By default, the images folder has sub-folders to keep your files organized. You can create additional folders in images and documents as you wish by creating a new folder through using the Folder – Navigation asset.

Your next step, whether you’re uploading a file or image, is to click on Add Content and then choose “Image” or “Document.”

A pop-up window will appear.

Choose the “Placement Folder,” which is where the file will live if it is not already selected.

Drag or browse for the photo on your computer. Once chosen, the image will appear in the photo editor in the bottom portion of the window. Documents do not appear in this window. See the “Photo Editing” section in this document.

After selecting the file to upload, the file name will appear in the File Name field. You have the option to rename the file. Make sure it is a web friendly name!

Keep in mind, the three letter extension (such as .pdf or .jpg) MUST be included in the System Name, at the end, for files to display properly when they are published to the web server.

If you don’t change the File Name after selecting the file, the original file name will be used. Typically speaking, you will not want to change the System Name after the file is published.

Click Save and Preview or Submit under the Kabab menu.

In case you later need to update the file, perhaps because the form has been updated to a new version, be sure to overwrite your old file, so that all the places it’s linked to will be updated, as well.

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EDITING IMAGES

Cascade has a basic image editing tool. To use it, your image needs to be uploaded to the Cascade server. (See “Uploading Images and Documents” section.)

- To get started, select the image you want to edit in the left file tree and then click "edit" tab above the photo. Or, when uploading a new image, the editor will be available at the bottom of the pop-up window for choosing your photo from your computer.

- You will see the image full-size in a WYSIWIG window with editing options at the top. The editing options available are: “Undo,” “Redo,” “Resize,” “Rotate,” “Flip,” and “Crop.”

- **RESIZE** - Type the new dimension you want the image to appear into either the width OR height box. The number in the other box will change automatically, maintaining the proper proportions of the image. Click the “resize” button to have the image resize.

- **ROTATE** - If your image appears sideways, click either the “clockwise” or “counter clockwise” button to reorient your image.

- **FLIP** - To flip your image, click on either the horizontal flip button or the vertical flip button. The flip tool should be used very carefully. Any words or text on your image will appear backwards when using the flip tool.

- **CROP** - Move the cursor over the image and you will see crosshairs. Move the crosshairs to the area you want to crop. Click and drag across the image to the desired location and release. You can adjust the outline by moving the cursor over the small squares around the outline until it becomes an arrow. Click and drag the outline to the correct location and release. When you are satisfied with the location of the crop outline, click the “crop” button on the top right to complete the crop.

Once you are happy with your edited image, click the "Save and Preview” button to save the edited image.

700 pixels is the maximum width for the file size. For more information on appropriate dimensions, email ecas.comm@emory.edu