GENERAL TEMPLATE AREAS

SIU Headers

SIU Headers are created and edited through the main administration of the CMS. Users do not have access edit SIU headers.

Logo and Identifier

Logo or the College Identifier are created and edited through the main administration of the CMS. If the name of the department changes, please contact Interactive Services.
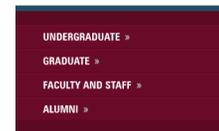
Navigation

The navigation is generated automatically based on the structure of a site. Users can choose to exclude certain items from the navigation if desired.

SIU Footer

The SIU Footer is edited through the main administration of the CMS. Users do not have access edit the SIU footer.

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ACCESS YOUR SITE

Cascade Server CMS is web based so you can access your site **using the web browser of your choice**.

LOGGING IN

Website

stage.web.siu.edu

Username

Users first initial and last name. (Example: Jill Smith's username would be jsmith.)

Password

You will set your password in training. Please choose something you will remember. If you lose your password please fill out a help ticket requesting a password reset at:

http://www.webservices.siuc.edu/ticket/

CASCADE SERVER CMS BASICS

DASHBOARD

Description: The dashboard shows general information and a summary of activities.

SYSTEM MENUS

Site Chooser

A Site Chooser drop-down will be displayed at the top of the interface, allowing you to easily jump between the Global Area and content specific to a particular site.

Home, New, and History Menus:

HOME: will take you back to the dashboard.

NEW: allows you to create new content assets like files, folders, pages, or blocks.

HISTORY: will allow you to view and quickly navigate to all of your recently viewed assets.

ASSET TREE & BASE FOLDER

Description: To the left of the Dashboard is the Asset Tree where all assets in the system can be found and organized. Clicking on a folder will open it in the Asset Tree, revealing the assets or subfolders inside. It will open in the main viewing area as well.
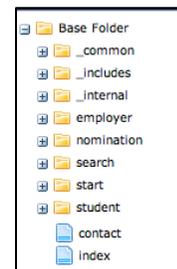
ASSETS – ABOUT AND CREATING

An asset is any entity within the system that can be used to generate content. There are five main types of assets for a site - FOLDERS, PAGES, EXTERNAL LINKS, FILES, and BLOCKS.
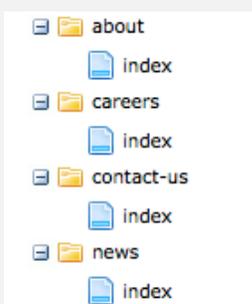
📁 FOLDERS

<u>Description</u>

A site should be organized into different FOLDERS. Each FOLDER contains pages, external links, and files related to that section of the website. **The FOLDERs** *Display Name* **determines the text that appears as a link in the navigation of a site.**

<u>Requirements</u>

Each FOLDER must contain one main file that is named "index" if you want it to appear in the site navigation – this index page will be the main page for the section. **It is very important that folders and files within the CMS be in the proper structure.**

Example: FOLDERS & SITE NAVIGATION

The main navigation of this site example will use each FOLDER's *Display Name* to show the name of the section and will look similar to the navigation on the right. ➔

➤ TO ADD NEW FOLDER:

Click *NEW* in the *System Menu*, then FOLDER WITH INDEX and then choose the type of index page you would like to have as the index of that folder. (Note: this will create a folder with a home page by default. If you wish to ONLY create a non-formatted folder choose *New*, then *Default*, then *Folder*.)

Enter FOLDER information:

System Name: Name the FOLDER logically. Names must contain <u>letters and numbers only, hyphens instead of spaces, and should not have uppercase characters</u>.

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Parent Folder: Choose the folder where you want to save the new FOLDER. (Note: it is acceptable to create folders within folders for organizational purposes.)

Display Name: The *Display Name* is the text that will appear in the main navigation.

Include in Left Navigation: Include or do not include the FOLDER in the left navigation.

*Publish checkbox***:** Uncheck if you do not wish to publish this asset in the future.

Index checkbox: Leave checked.

Click *SUBMIT*

PAGES

Description

This is a final "web page". By default, each FOLDER will contain a PAGE named "index" (see Example 1). Additional PAGES can also be added to each FOLDER. Unless the user chooses the "No" radio button for the option "Include in Left Navigation", each page will be included in the navigation of the site, with the *Display Name* as the navigation item text.

Requirements

When creating a PAGE, make sure it is *always* within a FOLDER of the site, and *not* in the root of the site.

TO ADD NEW PAGE:

Click *NEW* in the *System Menu*, then PAGE, then choose the type of page you would like to create.

Enter PAGE information and content:

System Name: Name the PAGE logically. Names must contain <u>letters and numbers only, hyphens instead of spaces, and should not have uppercase characters</u>.

Parent Folder: Choose the folder where you want to save the new PAGE.

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Display Name: The *Display Name* is the text that will appear in the main navigation.

Title: the *Title* is the text that will appear as the title of the page at the top of a browser tab or browser window. This should be named with the following structure: "Page Title | Department Name | SIU".

Include in Left Navigation: Include or do not include the FOLDER in the left navigation.

Other editable regions: There are many other editable regions to the page that change depending on template. These are the areas where main content of the page is added. Refer to other parts of this manual for instructions.

Click *SUBMIT*

EXTERNAL LINKS

Description

Links to external Web sites that are not connected to a site but need to be included in site navigation.

Requirements

In order to include an EXTERNAL LINK in site navigation, create new EXTERNAL LINK asset and save it in the folder where you want the link to appear. The *Display Name* is what will appear as a link if you choose to include the link in the site's navigation.

TO ADD NEW EXTERNAL LINK:

Click *NEW* in the *System Menu*, then EXTERNAL LINK.

Enter LINK information and content:

System Name: Name the link logically. Names must contain <u>letters and numbers only, hyphens instead of spaces, and should not have uppercase characters</u>.

Parent Folder: Choose the folder where you want to save the new EXTERNAL LINK.

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Display Name: The *Display Name* is the text that will appear in the main navigation.

Include in Left Navigation: Include or do not include the FOLDER in the left navigation.

Link: Enter the full URL of the link, including "http://".

Click SUBMIT

FILES

Description

FILES are images and documents that you wish to upload to your site.

Requirements

Always upload image FILES to the *images* folder within the *_common* folder. Always upload documents such as .pdf files, .docx files, and .xlsx to the *_documents* folder.

TO ADD NEW FILE:

Click *NEW* in the *System Menu*, then *Default*, then FILE.

Enter FILE information and content:

System Name: If uploading a file you do not need to enter the system name. **Names must contain** letters and numbers only, hyphens instead of spaces, and should not have uppercase characters. Do not make file names longer than necessary. For example, a file named 2013-outstanding-faculty-of-the-year-application.pdf should be shortened to 2013-outstanding-faculty-app.pdf.

Parent Folder: Choose the folder where you want to save the new FILE. (Note: most files are saved and organized in the *_common* folder, either in the *images* folder or the *documents* folder.)

Browse to the file on the computer by clicking *Choose File.* When the file is uploaded make any neccessary edits to the file.

Click SUBMIT

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BLOCKS

Description	Requirements

Description

A BLOCK is a "pluggable " and reusable piece of content that can be easily substituted, with or without styling, into page regions.

Requirements

Always save BLOCKS to the *static* folder within the *blocks* folder within the *_internal* folder. Create BLOCKS ONLY if you will need to reuse the content of the BLOCK, in order to save time and prevent error in editing identical content.

TO ADD NEW BLOCK:

Click *NEW* in the *System Menu*, then *Default*, then BLOCK.

Choose *XHTML/DATA Definition Block,* then click Submit

Enter BLOCK information and content:

System Name: Name the BLOCK logically. Names must contain letters and numbers only, hyphens instead of spaces, and should not have uppercase characters.

Parent Folder: Choose the folder where you want to save the new BLOCK. (Note: BLOCKS should be saved and organized in the -*_internal/blocks/static* folder.)

Enter the content for the BLOCK in the WYSIWYG editor.

Click SUBMIT

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ABOUT EDITING PAGES - REGION OPTIONS

There are different methods of adding content to each region, depending on the flexibility set up in the template.

TEXT ONLY

Some regions only allow text entry with no added options, for example:

WYSIWYG EDITOR

WYSIWYG stands for "What you see is what you get". Some regions allow text entry with the options to add links, images, and styling within text content, for example:


FILE SELECTOR

Some regions allow you to select files within the site to use in the regions. These are for adding images or blocks, for example:

To use an image or block in these areas, click the image or block icon and navigate to the correct file within your site.

FILE SELECTOR or WYSIWYG EDITOR

For these unique areas, if a block is not chosen for content, the content of the WYSIWYG editor will be used. If there is no block chosen and no content in the WYSIWYG, the region will not appear on the page, for example:
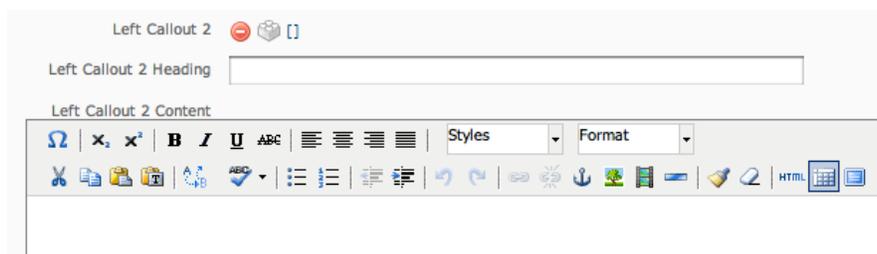
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REGIONS WHERE MULTIPLE ITEMS ARE ALLOWED

If a region will allow for the entry of multiple areas of content a plus symbol ⊞ will appear in the upper left of the region's editing area. To add another area click the plus symbol. Once there are multiple items in that region a symbol in the upper left will appear that indicates which order the items are in, allows the user to change the item order and allows the user to delete the item. The symbol looks like this: ⊞ ⊟ ▼ ▲ (2/3)

Use the plus and minus, and up and down arrows to add, move or delete items.

MAKING CHANGES TO ASSETS

Once created, *Assets* can be edited in many different ways. When previewing an *Asset* in the CMS a menu will appear above the preview of the page. Additionally, clicking the small arrow that appears upon rollover in the *Asset Tree* will display the same options.
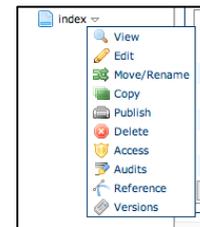
EDIT

Once created all *Assets* can be edited.

1. Start by locating the *Asset* in the asset tree and clicking on the *Asset* you would like to edit.

2. Once the *Asset* has loaded, click on the Edit tab located above the preview.

3. From here you are able to edit all the content of an *Asset*. Make the desired changes to the document. While you are editing an *Asset*, such as a page, file, or folder, the asset is automatically locked to prevent other users from accessing the same asset while it is being edited. When edits have been made and the asset has been submitted, the asset is automatically unlocked so that other users can access it.

MOVE/RENAME

All Assets can be moved and renamed. Change the system name of a file or move it to a different location with in the site.

COPY

This feature can be handy if there is a page that has blocks or features added to it that you want to appear on a new page. Copy current pages and place them anywhere in the site.

PUBLISH

The Publish tab allows users to publish assets to a web server.

MORE >> VERSIONS

Cascade Server maintains a full version history on each asset in the system. As

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changes are made to any asset in the system, Cascade Server keeps track of the changes in separate copies of the asset called *Versions*. The versions list for each asset shows a list of each version, the author for each change, including the original creator of the asset, as well as the time and date of the change and any notes available. Users may navigate through the various versions, compare them

with the current version, and activate any version desired.

MORE >> DELETE

Users may delete any asset. When deleting, you must also click the *Un-publish Content* checkbox so that the asset is deleted from the web server. The DELETE area will display a list of all pages within your site that are linking to that *Asset*.

ADDING A LINK TO PAGE CONTENT

Add links to existing pages within your site, external websites, or to PDF documents.

1. Within the WYSIWYG editor, highlight the word or words you wish to turn into a hyperlink.

2. Click the insert web link icon on the toolbar. The insert link window will now open with two options - one for internal links, and one for external.

3. **To insert a link to a page or document within your site**, click on the page icon to open a new window that will allow you to select the page to which you will link.
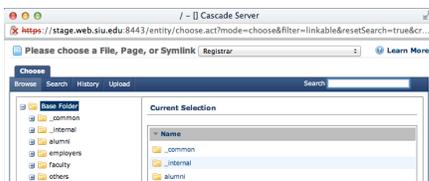
4. **To insert an external link**, paste the URL of the external link into the LINK field. Change TARGET to *New Window* if you want the new page to open in a new window.
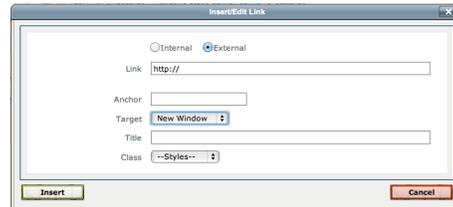
5. **Click INSERT**

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ADDING AN IMAGE TO A PAGE

ADD AN EXISTING IMAGE

1. While editing a page, in the WYSIWYG editor click the *Image* icon.

2. In the new pop up box, click the *File* icon and navigate to the *_common/images* folder.

3. Choose the image and click *Confirm.*

4. Add *Alternative Text* for the image.

5. Click Insert

6. Don't forget to publish the image or it will not appear on a web page (see page 19, *PUBLISHING).*

Note: to change the alignment of an image, click the *Advanced* tab in the *Insert/Edit Image* window and change the alignment in the dropdown menu.

ADD A NEW IMAGE

1. In the *System Menu* at the top click NEW.

2. Under the DEFAULT pop-out click FILE.
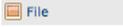
3. Make sure the PARENT FOLDER is set to the _common/images folder

4. Scroll down to the DATA area and click CHOOSE FILE.

5. Navigate to the file on your computer and open it.

6. Once done resizing or editing the image, click SUBMIT.

7. Go to the page you wish to add the image to and follow steps 1-5 in *Add an Existing Image*.

Common SIU Images

All CMS users have access to a library of approved images. In the *Site Chooser*, choose the site named "Common Images" and browse to the images you wish to use. There are folders containing images sized to the appropriate banner image size. These images are already published.

REPLACING A DOCUMENT OR FILE

PDF files and other documents might be updated on a yearly basis. Rather than uploading a new document, you have the option to override the document you want to replace. The same is true with images and other types of documents.

1. Navigate to the document you want to replace (probably in *_common/documents* FOLDER).

2. Click the file for the document to preview it and click EDIT.

3. Click CHOOSE FILE to browse to the new file on your computer.

4. Click SUBMIT.

5. PUBLISH the new file.

REORDERING THE NAVIGATION

The order of the links in the navigation can be changed. In the *Asset Tree* click the BASE FOLDER. The view should look something like the image below.

Click the *Order* column heading to display the site folders and files in order. Either click and drag the files or folders to change the order, or use the blue up and down arrows on the right.

To reorder items within a folder, click the folder name in the *Asset Tree* and reorder them in the same way.
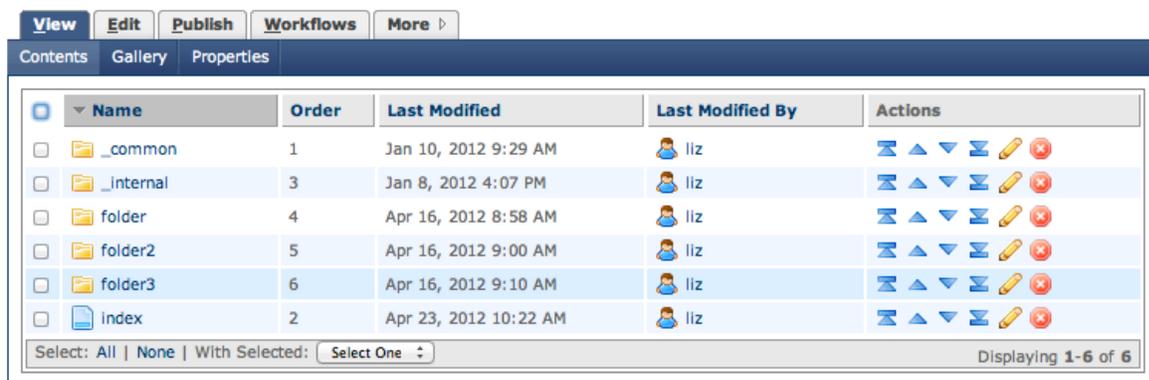
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SHARED ITEMS

Top Contact

Phone number and contact information for a department is a requirement on the SIU templates. The contact information can be an email address or a link to a contact form or page. Changes made to this block will be inherited on all other pages.

TO EDIT THE TOP CONTACT:

Navigate to the Top Contact block - _internal > blocks > setup-blocks > contact-top. **Click** on the "contact-top" block and **Click** *EDIT*.

In the *Phone Number* field, type the main phone number for the department, including area code.

In the next few fields, enter either an *Email Address* or an *Internal Link*. If an *Internal Link* is entered, add a *Link Heading* such as "Request Information" or "Contact Us".

Click SUBMIT

Contact Footer

Contact information for a department is a requirement on the SIU templates. Basic contact information must appear within the footer. The Webmaster (technical contact) for the website must be listed here. Changes made to this block will be inherited on all other pages.

TO EDIT THE CONTACT FOOTER:

Navigate to the Contact Footer block - _internal > blocks > setup-blocks > contact-footer. **Click** on the "contact-footer" block and **Click** *EDIT*.

In the *Address and Phone Number* area, type text in the WYSIWYG editor. Add links to the text if needed.

In the *Webmaster Email Address* area enter the email address of the webmaster for the site.

Click SUBMIT

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Social Media Footer

The social media footer area is optional. Links in this area can include, but are not limited to, Twitter page, Facebook page, or YouTube page. This area should use unique departmental social media links. Changes made to this block will be inherited on all other pages.

▶ TO EDIT THE SOCIAL MEDIA FOOTER:

Navigate to the Social Media Footer block - _internal > blocks > setup-blocks > share-links. Click on the "share-links" block and click *Edit*.

Enter your social media links in the WYSIWYG editor. Make sure they are in a bulleted list.

If you wish to add classes to the list in order to place the icons, use the following HTML code:

```
<ul class="menu">
<li class="share-tw"><a href="#">Follow us</a></li>
<li class="share-fb"><a href="#">Like us</a></li>
<li class="share-yt"><a href="#">Watch us</a></li>
</ul>
```


If you need a different social media icon in that area please contact Interactive Services.

Click *SUBMIT*

Google Analytics

Google Analytics is optional. Departments wishing to include Google Analytics on pages need to have Google Analytics set up within the department and the Google Analytics script can then be added to all pages in a site.

▶ TO ADD GOOGLE ANLAYTICS SCRIPT:

Navigate to the Google Analytics block - _internal > blocks > setup-blocks > google-analytics. **Click** on the "google-analytics" block and **Click *EDIT***.

In the text entry field paste in the script generated by Google Analytics.

Click *SUBMIT*
NOTE: In order for this change to be fully implemented, the entire site will need to be published.

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THE HOME PAGE

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Slideshow and Banner Image Area

This is the main image area for the home page. This area can contain a slideshow or a static image.

> ## TO EDIT THE HOME PAGE SLIDESHOW:
>
> **Click** the *SLIDESHOW* link near the top of the "academic home page" editing area to expand the *SLIDESHOW* editing area.
>
> Choose the **Image** for the slideshow and then choose the images **Thumbnail**.
>
> *Image size: 479px × 275px*
>
> *Thumbnail size: 100px × 56px*
>
> *Title*: Optional
> *Link or External Link*: Optional
> *Description*: Optional
>
> **To add a new photo** click the plus button within any of the "Slideshow >> Slide" areas and edit the new area that appears. Click the minus button to remove a feature.
>
> **To re-order photos** click the up and down arrows in any of the "Slideshow >> Slide" areas. The number that appears next to the up and down arrows indicates the order of the photos.
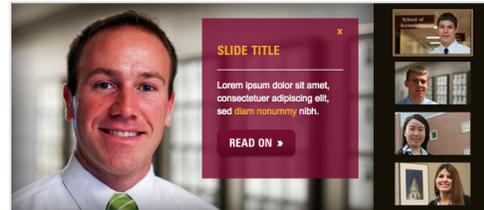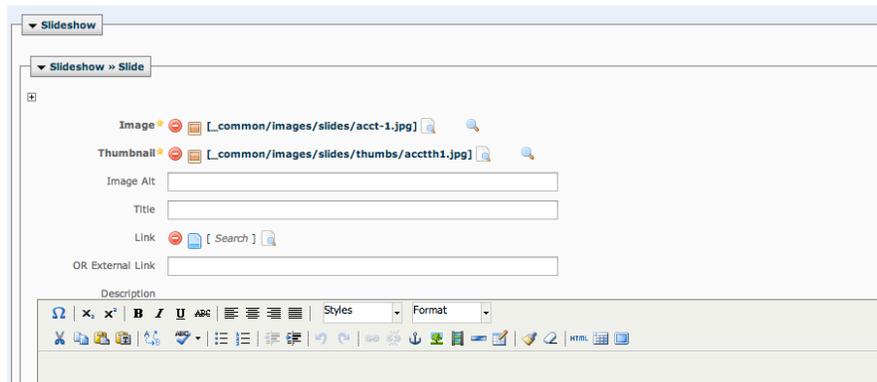
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Feature Area

Feature multiple degrees and faculty members in this area. If more than one degree or faculty block exists, the content will display randomly upon refresh. See the *College Site Rollout Guidelines & Recommendations* document to view content guidelines. **THERE ARE 2 STEPS TO CREATE AND ADD A FEATURE.**

> ### ➤ TO CREATE FEATURE BLOCKS:
>
> **Click** *NEW* in the *System Menu*, then click *HOME PAGE FEATURE.*
>
> **Enter FEATURE information:**
>
> *System Name*: Name the BLOCK logically. Names must contain <u>letters and numbers only, hyphens instead of spaces, and should not have uppercase characters</u>.
>
> *Parent Folder:* Choose the folder where you want to save the new BLOCK. It should be in _internal/blocks/static folder. (Note: it is acceptable to create folders within folders for organizational purposes.)
>
> *Data Definition:* DO NOT CHANGE THIS.
>
> *Image:* Browse to the image you wish to link to this feature.
>
> > *Image size: 310px × 206px.*
>
> *Image Alternative Text*: Enter alternative text for the image.
>
> *Heading*: Enter the Heading for the feature.
>
> *Content:* Enter a short summary (approximately 20 words).
>
> *Link Text:* Enter the text that will appear as the link to more information about this feature.
>
> *Link (internal or external):* Link to more information about the feature.
>
> **Click** *SUBMIT*

Image size: 310px × 206px

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TO ADD FEATURED DEGREE AND FACULTY BLOCKS TO THE HOME PAGE:
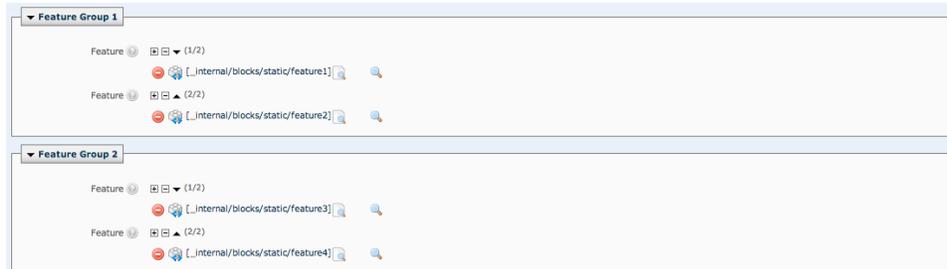
Click the *Edit* tab for the index page to edit the page**.**

Add Feature items to FEATURE GROUP 1 or FEATURE GROUP 2 by clicking the block link and navigating to the feature block for that area.

To add a new feature block click the plus button within any of the "Feature" areas and edit the new area that appears. Click the minus button to remove a feature.

To re-order features click the up and down arrows in any of the "Feature" areas.

INSIDE PAGES

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Inside Page – Inline Metadata

Display Name: The name that will appear as a navigation item and in breadcrumbs.

Title: The title will appear at the top of a browser window.

Include in Left Nav: Choosing Yes will include the page's DISPLAY NAME in the left hand navigation.

Include in Top Nav: Choosing Yes will include the page's DISPLAY NAME in the top navigation, only if the page is in the root of the site.

Inside Page – Slideshow or Banner Image

Primary pages have the option to have a slideshow, a banner image, or no image.

⬗ TO ADD A PRIMARY PAGE WITHOUT A SLIDESHOW:

Click NEW, then **PAGE**, then **PAGE.**
> *Banner*: Optional
> *Banner Alternative Text*: Enter the banner's alternative text.

Image size: 630px

⬗ TO ADD A PAGE WITH A SLIDESHOW:
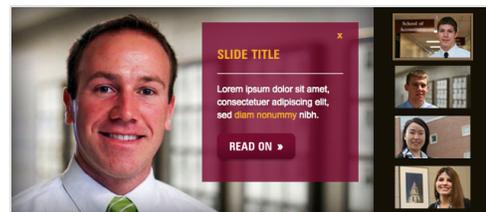
Click NEW, then **PAGE**, then **PAGE WITH SLIDESHOW.**

▸ Slideshow **Click** the *SLIDESHOW* link near the top of the "academic home page" editing area to expand the *SLIDESHOW* editing area.

Thumbnail size: 100px × 56px

> Choose the **Image** for the slideshow and then choose the images **Thumbnail**.

> *Title*: Optional
> *Link or External Link*: Optional
> *Description*: Optional

To add a new photo click the plus button within any of the "Slideshow >> Slide" areas and edit the new area that appears. Click the minus button to remove a feature.

To re-order photos click the up and down arrows in any of the "Slideshow >> Slide" areas. The number that appears next to the up and down arrows indicates the order of the photos.

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Inside Page - Main Content Area

The main content (default) area of all inside pages holds the main content of a web page. The templates have extra areas, such as blockquote options and callout boxes.
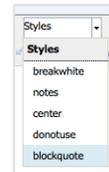
▶ TO ADD A BLOCKQUOTE TO THE MAIN CONTENT AREA:

When editing a PAGE:

Highlight the text you wish to appear as a blockquote.

Choose "blockquote" from the STYLES dropdown in the WYSIWYG. Enter your social media links in the WYSIWYG editor. Make sure they are in a bulleted list.

Inside Page - Content Callout Box

The main content area of the PAGE template has the option to add callout boxes just below the main content. If no content is entered for those areas the boxes will not appear. These optional areas can contain content entered at the individual page level.

▶ TO ADD CONTENT CALLOUT BOXES:

When editing a PAGE:

Enter CONTENT CALLOUT information:

Thumbnail: *Optional.* Navigate to the thumbnail image within your site. *Image Size: 278px × 189px*

Title: Enter the heading for the CONTENT CALLOUT BOX.

Content: Enter the CONTENT CALLOUT BOX content.

To add a new CONTENT CALLOUT BOX click the plus button within any of the "Content Callout Box" areas and edit the new area that appears. Click the minus button to remove a feature.

To re-order CONTENT CALLOUT BOXES click the up and down arrows in any of the "Content Callout Box" areas.

Image Size: 278px × 189px

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Inside Page - Sidebar

The left sidebar of the inside PAGE template has optional areas. If no content is entered for those areas the boxes will not appear. These optional areas can contain content entered at the individual page level or in blocks - content that can be shared among many or all pages. The maximum number of sidebars for a page is **two**.

▶ TO ADD CONTENT TO THE SIDEBAR:

When editing a PAGE:

Enter SIDEBAR information:

Heading: Enter the heading for the SIDEBAR.

Sidebar Block: Navigate to the block you wish to use within your site. This will override any content in the "Content" area.

Content: Enter the SIDEBAR content. If a "Sidebar Block" is chosen, the content in this area will be overridden.

To add a new SIDEBAR, click the plus button within any of the "Sidebar" areas and edit the new area that appears. Click the minus button to remove a feature. The maximum number of sidebars for a page is **two**.

To re-order SIDEBARs click the up and down arrows in any of the "Sidebar" areas.

PUBLISHING

Publishing to a web server is available for pages, files, folder, image, and documents. For an *Asset* to appear live on the Web, it **MUST** be published first.

To PUBLISH ONE ASSET:

1. Navigate to the asset
2. Click the Publish tab
3. Leave all checked items checked
4. Click Submit to publish your content to the selected destinations.

To PUBLISH AN ENTIRE FOLDER OF ASSETS:

1. Navigate to the folder

2. Click the Publish tab
3. Leave all checked items checked
4. Click Submit to publish your content to the selected destinations.

To PUBLISH AN ENTIRE SITE (PLEASE BE COURTEOUS TO

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OTHERS AND DO NOT DO THIS BEFORE 4:30 PM):

1. Navigate to the *BASE FOLDER*

2. Click the Publish tab

3. Leave all checked items checked

4. Click Submit to publish your content to the selected destinations.

To UNPUBLISH ASSETS:

1. Navigate to the asset

2. Click the Publish tab

3. In Options, change Publish Mode radio button to Un-Publish

4. Click Submit to publish your content to the selected destinations.

RESOURCES

Hannon Hill Knowledge Base (HELP) - http://www.hannonhill.com/kb/

Interactive Services Help Ticket - http://www.webservices.siuc.edu/ticket/

Accessibility Information - http://webstandards.siuc.edu/?page_id=35