Updating McCormick Department Sites in Cascade
A Guide for Site Administrators

By the McCormick Office of Marketing and Communications and IT Resources

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Contents

What’s Responsive? ............................................................................................................. 5

Module 1: Cascade Basics I – Getting Familiar ................................................................. 9
  Logging in to Cascade .................................................................................................... 9
  The Dashboard ........................................................................................................... 10
  The Navigation Panel ............................................................................................... 12
    Assets ...................................................................................................................... 12
  Naming Files, Folders, and Webpages ...................................................................... 13
  The Toolbar .............................................................................................................. 13
    Recent History ...................................................................................................... 14
    Tool ...................................................................................................................... 15
  The Contextual Menu .............................................................................................. 15
  Recycle Bin .............................................................................................................. 15

Module 2: Editing a Basic Page ....................................................................................... 16
  Page Location/URL ................................................................................................. 17
  Inline Metadata ....................................................................................................... 17
  Header Image/Slider ............................................................................................... 18
  Jump Menu ............................................................................................................. 19
  Editor Toolbar - WYSIWYG ..................................................................................... 21
  Basic Formatting ..................................................................................................... 24
  Headings and Subheadings ................................................................................... 25
  Copying and Pasting ............................................................................................... 26
  Inserting and Editing Links .................................................................................... 27
  Anchor Links .......................................................................................................... 28
  Sidebar Options ..................................................................................................... 29
  Draft ....................................................................................................................... 31
  “Submit” Vs. “Publish” .......................................................................................... 31
  Publishing Your Webpages ..................................................................................... 32
  Writing for the Web ................................................................................................. 34
    Optimize System Names ....................................................................................... 34
    Use Descriptive Page Titles ............................................................................... 35
Module 5: Department Page Types

People Listing
Faculty Listing
Faculty Profiles
  Budgetary / Tenure-track Faculty Profiles (e.g. Core faculty)
  Affiliated Profiles
News Articles
News Article Sidebar
News Index
Event Listing
Course Listing
Course Description
Homepage
  Feature Slideshow
  Main Content
  Sidebar

Module 6: Other Helpful Tips

Versions
Creating Line or Paragraph Breaks
Basic Troubleshooting
Today, you can access websites on a desktop, laptop, tablet, mobile phone and other devices, each with varying screen sizes. Responsive design is a method of creating a flexible or fluid website layout that will adapt to any size screen.

The layout of the page changes and items, shrink, shift around and collapse as the viewing screen size decreases. Because the layout transforms for different screen sizes, it’s important not to refer to things on the page as “to the left,” “above,” “below,” or “to the right.” The position may change. It’s also very important to follow guidelines illustrated in this manual for headers, image sizes, etc. to ensure the site looks good and performs well on different devices.

Take a look at how the basic page transforms as the screen decreases from desktop size down to mobile:
At tablet size, the right sidebar is not present. Instead:

- Breadcrumbs turn into collapsible menu
- The sidebar feature no longer displays
- Related Info and Contact Info areas move to the bottom of the page
At mobile size, the feature slideshow becomes one static image w/o caption. And the site's navigation is accessed via menu bar icons.

The left navigation and breadcrumbs are now expandable from the blue Section Menu.

The main site navigation can be expanded by clicking the purple menu bar icon at the screen's top right.
Module 1: Cascade Basics I – Getting Familiar

Logging in to Cascade

Open a browser and enter the following URL (or click this link):
http://mordac.itcs.northwestern.edu/

You will be redirected to the NU Online Passport Single Sign-On page.
Enter your Net ID and password. Then press “Enter” or click “Log In.” Click “Continue” if a security warning message pops up.

This security warning is not an indicator of an actual security threat; it can safely be ignored while using Cascade.

NOTE: On occasion after logging into Cascade, your browser may indicate you are logged in, but not take you to Cascade’s Home Screen.
Should this error occur, simply return to the login URL (http://mordac.itcs.northwestern.edu/) and your browser will automatically redirect you to the Home Screen, so you can begin working in Cascade.
The Dashboard

The first thing you’ll see upon logging in to Cascade 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 webpages, folders, images, and files (also called “assets”).

- The toolbar, which runs across the top of the screen, allows you to perform a set of actions, such as creating an asset.

Best Practice:

McCormick IT recommends Cascade users work in Chrome or Firefox. Internet Explorer also works, but Chrome and Firefox generally perform better. Mac users are also advised to use Chrome or Firefox. When previewing changes to your website in a browser, it is suggested to avoid using Firefox since you may need to force its cache to refresh in order to load your site’s latest content changes.
• The **dashboard / main panel**, which takes up the majority of the screen, changes according to the task you are performing.

You’ll notice a drop-down menu at the top of your screen that says “Global” by default. Clicking the down arrow on the menu tab reveals the sites you have access to view and edit in Cascade.
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. Clicking the “+” or “-” expands and contracts that folder’s content, as shown below.

To begin browsing the 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. Choosing 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.

Assets

What’s an Asset?

In Cascade, the word “asset” is a blanket term for any object loaded into, or created in, the Content Management System.

An asset can refer to:

• a web page  
• a PDF  
• an external link

• an image file (photo)  
• an MS Word document  
• an internal link

• a folder  
• an MS Excel document
Naming Files, Folders, and Webpages

Since asset filenames become part of their URL addresses and also affect how readily your website appears in search results, it is important to follow certain conventions as you name your assets in Cascade.

When providing the **System Name** of any asset in Cascade, please follow these guidelines:

- System Names should not contain any spaces and should not be unnecessarily long.
- They should use keywords, all lowercase, separated by hyphens.
- They should not include dates that will expire.

Here are examples of good and bad System Names:

<table>
<thead>
<tr>
<th>GOOD</th>
<th>BAD</th>
</tr>
</thead>
<tbody>
<tr>
<td>catalysis-research-laboratory.jpg</td>
<td>CatReschlab.jpg</td>
</tr>
<tr>
<td>john-smith.jpg</td>
<td>John Smith Good Headshot1.jpg</td>
</tr>
<tr>
<td>john-smith-publications.pdf</td>
<td>Johnsmith_Pubs_9-12-11.pdf</td>
</tr>
<tr>
<td>smith-group-newsletter.pdf</td>
<td>SmithResearchgroupNewsletterApril2012.pdf</td>
</tr>
</tbody>
</table>

Following good hygiene when naming your assets also saves you time and trouble as you organize and maintain your website content in Cascade.

The Toolbar

Cascade’s toolbar is similar to those in most desktop applications, like Microsoft Word or Excel.

Some toolbar items are simply buttons; others are drop-down menus (indicated by a double downward arrow).

The functions available in the Toolbar are similar to those found on the Dashboard, but are consistently available, unlike the Dashboard.
The Cascade Swirl button gives you access to the Publisher screen and allows you to set your User Preferences.

The Home button returns you to the Cascade Server Home screen.

The New menu is used to create new assets.

The History button shows you where you have been since you logged in.

The Help menu contains in-system help (though this guide should be considered the authoritative document for McCormick Web editors).

The “Quick Links” link causes a drop-down menu with access to the items on your Dashboard to appear.

**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 function 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 or by visiting **Quick Links**—a link at the top right, just above the blue toolbar.

**Tool**
Cascade allows for multiple images to be uploaded at a single time via the Zip archive importer. An archive is a file that contains other files and folders packaged together in a zipped format. To upload many images at once, zip the folder on your desktop then go to Tools -> Zip Archive (if available) and drag and drop or browse for your file.

**The Contextual Menu**

When you hover over an asset in the left navigation tree, a small white downward arrow will appear. Clicking that arrow reveals the contextual menu for that asset. The contextual menu is a shortcut that allows you to quickly jump into editing and other functions available in the Toolbar without waiting for the page preview to load in Cascade first.

**Recycle Bin**
The Recycle Bin contains assets you and other site users have recently deleted. These assets are kept in case of accidental deletion. **NOTE:** assets in the Recycle Bin are deleted permanently after 15 days.

Access the recycle bin in the last tab of the Dashboard window or in the Quick Links drop down menu.

To restore an asset to its original location, click the green icon in the Action column.
Module 2: Editing a Basic Page

To edit a basic page, select that page from the left-hand navigation tree. Then choose "Edit." This will bring up the editing view of the page. Here's a look at the editing view of the "About McCormick" page of the site:
Page Location/URL

At the top of the editing window you'll notice and indication of the page's location on the sited noted in a path directory format: about/index.

This indicates that the page has a System Name of "index" and is located in the "about" folder. It also indicates what the page's url is:
http://mccormick.northwestern.edu/about/index.html

Note: Because this is an index page, http://mccormick.northwestern.edu/about/ will also direct to this page.

Inline Metadata

When editing an existing page, you'll notice the "Inline Metadata" section is filled in with the page's "Display Name," "Title," etc. The Display Name appears in the left navigation of the site and the "You Are Here" breadcrumbs. The title appears on the actual page.
Learn more on how to fill out this section in the "Include Metadata" subsection of this guide.

**Header Image/Slider**

If you would like to include a Header Image or slideshow at the top of the page, click to expand the Main Content >Header Image(s)/Slider section.

As you answer the series of "Yes/No" questions about your image(s)/slideshow, options will appear to further indicate specifications such as:

- one header image or a multi-image slider
- automatically cycle through images on the page or leave it up to the user to advance the slideshow
- advance slides every 20 seconds (default) or for a number of seconds you specify
If you've chosen to create a multi-image slider, the area to add the image and caption for each slide will appear below the options section:

Click to expand this section and edit the fields for the slides. Add more slides by clicking the **green + (plus sign)** in the top left of the expanded slide area.

**Jump Menu**

The basic page type has a Jump Menu option to create a list of links to various sections of the page. This is ideal for lengthy pages on a responsive site so mobile users can skip to the information they're looking for rather than scrolling through all the page’s content.
To use this menu, select "Yes" for "Include jump menu?" Click the "Main Content>>Jump Menu" box that appears. You'll first notice an area for optional Preface Content which would appear before the jump menu on the page. Use this area for an introductory message to your pages content if necessary.

Below, is the area to create your menu links. You must fill in the field for the link Text (the text that will appear in the menu on the page) and the Anchor Name (the section of the page you to jump to). Then, you must create anchors with the same names in the Body Content section in the area of the page you wish to link to. See the "Anchor Links" section of this guide to learn how to create anchors.
**Editor Toolbar - WYSIWYG**

Since Cascade uses a WYSIWYG (What You See Is What You Get) editor, the formatting you apply to your content is generally how it will appear on your website.

Cascade’s editor toolbar lets you apply the same basic formatting you’d have access to in any word processor — headers, paragraph (body) copy, bulleted and numbered lists, bold, italics, and much more.

Many of the options on the Cascade editor toolbar (especially the ones on the left side) will be familiar to users of common word processing software. You can perform many of the same actions to format text as you can in a program like Microsoft Word.

However, there are some tools – noted in the graphic above – that may require some additional explanation with regards to how they function.
**Custom Character:** Use this tool to insert special characters such as ampersands, accent marks, letters in foreign languages, artistic symbols and the like.

**Paste:** This function works the same as in other word processing software; however, you should be aware of two things:

1. The pasted item may not appear exactly as you might expect if you are pasting in content from, say, Microsoft Word or a PDF; some software includes additional formatting that is not totally compatible with Cascade. (See the section of this guide on “Copying and Pasting”.)

2. **This tool may not work in some browsers.** Instead, you’ll need to use the “Control + V” (for PC) or “Command + V” (for Mac) shortcut to paste your content.

**Paste as Plain Text:** If you are pasting content in from Word or PDFs, you may want to use this option – just be aware that it will strip your content of all formatting, such as headers and numbered lists. See the section titled “Copying and Pasting” for more information about pasting content into Cascade from outside sources.

The **“Styles”** drop-down menu applies more complex formatting to text and images than Cascade’s WYSIWYG editor. These styles are particularly useful when fitting images alongside your content text.

The styles configured on your website will vary somewhat, but in general the following styles should be available:

- **indented:** add space before line of text
- **back_to_top:** formats text in a smaller font size and a specific color; this style is only for use on the “Return to Top” links used on very long pages of text. Use this style when linking to a "top" anchor on your pages.
- **link-arrows:** formats link as purple text with double right arrows after it
- **link-bttn, anchor-link-bttn:** both creates button with purple background and arrow. Arrow points down for anchor link style.
- **inline-callout**: creates a grayish box around a block of text

You’ll notice additional styles such as “image_floatLeft” and “image_floatRight” in the Styles drop down menu. Use of those features is addressed in the “Working with Images” section of this guide.

**NOTE**: When changing styles (for example, if you are trying to see whether an image looks better when floated to the left or to the right), you must remove formatting first using the “Remove Formatting” tool noted above. Cascade does not automatically replace one style with another.

**Link/Unlink**: These tools will allow you to create/edit hyperlinks out of any text or image within your body content.

**Insert/Edit Anchor**: Anchors allow you to mark points anywhere on your web page so that they can be easily accessible by users. They are most often used on web pages with a large amount of content, as they offer the ability to go directly to a single piece of content rather than scrolling down through the entire page.

**Insert/Edit Image**: Select this icon to insert an image into your page. Please read the “Inserting Images” section of this manual for important information on this process [page 41].

**Horizontal Rule**: This tool allows you to add a horizontal line at any point on your web page, which may be useful for separating sections of content. You can specify the width and height of the line, as well as choose whether or not it has a shadow.

**Insert New Table**: Do not use tables on the site! It will not format correctly when sized down to mobile. Most data can be represented well with headers and bullets. If you have information that absolutely needs a tabular display, please contact marketing at web-updates@mccormick.northwestern.edu.
**Cleanup Messy Code:** Sometimes, there will be unnecessary code related to your content – code that does not affect the function of the page but might affect its loading time. This tool allows you to remove such code, if it exists in a highlighted section of your content.

**Remove Formatting:** Use this tool very carefully – it will erase any hard work you’ve done to align text, bold/italicize/underline it or otherwise format it using the other tools. This may come in handy, however, when you’re working with content that has a lot of superfluous formatting that you want to change completely.

You should also use this tool to remove a previous alignment class for an image before adding a new alignment for that image or other created by the style drop down menu.

**Edit HTML Source:** This option allows you to take a look “under the hood” at the actual code that you’re creating through the Cascade editor. However, it is advisable to leave this alone unless you are familiar with HTML code – changes made here can affect the functionality of your site.

**Guidelines/Invisible Elements:** If you are using any guides to help you format your page (such as a grid), this tool will let you view them or make them invisible.

**Full screen Mode:** Clicking this icon will move your view to a full screen mode in your browser to allow for added working space. Click the icon again to return to the standard view.

**NOTE:** You will notice buttons in the editor toolbar to “underline,” “strike-through” and “indent” text in the editor window. Those styles are not preserved when you submit your page in Cascade and will not publish.

**Basic Formatting**
Formatting text as bold, italic, 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.
Best Practice: Use Headings and Subheadings Frequently!

- Use “Heading 2” to make a header in your page’s main content area.
- Use “Heading 3” to make a subheader in page’s main content area.

For additional information on using headings and other formatting to improve your website’s searchability, read the section of this guide titled “Optimize Your Content”.

**Headings and Subheadings**

It is important to keep your content well organized so your visitors can easily navigate and find the information they need. Use headings and subheadings on your pages to create a visual hierarchy for your visitors, similar to a document outline.

To create a heading in Cascade, select the text you wish to use as a header, then, in the Cascade Editor window, click the “Format” drop-down menu.

Select “Heading 2” or “Heading 3.”

The importance of a heading descends as its number ascends, so information used as a Heading 2 should be more important than that of a Heading 3.
NOTE: With this website template, you should not use any “Heading 1” or “Heading 2” formatting, since Cascade automatically formats your site and page titles to those headings.

**Copying and Pasting**

As you build and maintain your webpages in Cascade, you can type in your content by hand using the WYSIWYG content editor. You may find you need to input larger amounts of content from Microsoft Word documents or Adobe PDF files.

Before copying and pasting any content into Cascade, please review the following:

In most cases, **copying and pasting directly from Word or PDF documents into Cascade is not recommended**. Documents from word processing programs often contain hidden formatting which can create errors in the way content is displayed on the web.

To remove hidden formatting, it is recommended that you select the **Paste as Plain Text** toggle button located in the Cascade editor toolbar. With that button selected, text you paste into Cascade will automatically be stripped of any hidden formatting. Click the button a second time to return to normal pasting mode.

Another option you could use is to **first paste your content into a plain text editor** such as TextEdit or Notepad. Make that content “plain text,” and then copy and paste it again from there into Cascade. That process will strip any hidden code that you may accidentally include with your content.

**Whenever you paste or enter text into Cascade, you will need to reformat your text using the tools in Cascade’s editor toolbar**, creating headers, paragraphs, links, and other formatting manually as desired.

Making sure your text is pasted into Cascade as plain text will ultimately save you a lot of trouble later and ensure that your content appears exactly how you would like it to appear on the web.
**Inserting and Editing Links**

To create a hyperlink on a line of text or an image, highlight that piece of text or the image you’d like to link and click the chain-link button in the Cascade editor toolbar.

From there, you will need to specify the following:

- whether the link target is an internal page or an external URL
- whether the link will open in the same window or in a new window
- what the link’s title (which appears as the floating “tool tip” when a user hovers over link text) will be

**NOTE:** external links that go to webpages not part of your own site should open in a new window. Internal links to pages on your site should stay in the same window.

To create a link to someone’s email address, select the external link option and type “mailto:” followed by the desired email address in the URL field. For example, if you wanted to link to John Smith’s email address, type “mailto:john.smith@northwestern.edu” (without quotes) in the external URL field. In the “Title” field, enter something like “E-mail John Smith.” When a visitor clicks on that link on your website, their default email program will open a new email to that email address.
You can also use this tool to point to a page anchor, which is discussed in more detail below.

To edit a link, select the link in your editor window and click the chain-link button in the editor toolbar. You can modify the link’s attributes there.

To remove a link, select the link in your editor window and click the broken chain-link button in the editor toolbar.

**Anchor Links**

Anchors allow you to mark specific points anywhere on your webpage that can be linked to from external pages. For example, using an anchor link, it would be possible to link to, say, the third paragraph of a page, rather than the top of that page.

They are most often used on Web pages with a large amount of content, as they offer the ability to go directly to a single piece of content rather than scrolling down through the entire page. For example, the “back to top” links often used in long lists are actually pointing to the same page anchor at the top of the page.

**To insert an anchor:**

1. Go to the area of the page where you want the anchor to be (usually near a heading) and click the anchor tool.
2. Enter an anchor name and click “Insert.” **Anchor names must start with a letter** and cannot include spaces.

3. When you want to link to that specific section from a table of contents at the top of the page:
   
   a. Use the link tool as you would for an ordinary link, but rather than choosing an external page to link to, enter the name of the anchor link on the current page.

4. When you want to link to an anchor on a page **other than the one you’re currently editing**:
   
   a. Use the Link tool to select the page elsewhere in the site.
   
   b. Enter the name of the anchor link on that page in the “Anchor” field.

**Sidebar Options**

All pages have a right sidebar at desktop size. You can include the following 4 widgets:

- Related Links (optional)
  
  o Select “Yes” for “Include related info?” then click "Sidebar >> Related Links". Enter content for links. Click the green + (plus sign) icons to add another group/individual links.

- Contact Info (required)
  
  o Enter contact information. Click the green + (plus sign) icons to add another group/individual contacts.
Call-out (optional)
  - Fill out the Header and Content regions

Sidebar Feature (optional)
To add, select "Yes" for "Include a Sidebar Feature?"
Then, click the "Sidebar>>Sidebar Feature" box. You can create a feature for the specific page you’re editing or use a feature block, which can be added to multiple pages.
  - Create a feature: Select an image with dimensions 242 by 170px and fill out the Header and Content regions. Select the "Link Type" if you want the feature to link to another page. To add slides, click the green + (plus sign) at the top right.
  - Feature block: Select this option if you would like to insert a general sidebar feature block for more than one page. Sidebar feature blocks are stored in the "sidebar-features" folder and each will have a block icon. To create a new general sidebar feature:

1. Go to New ➔ Sidebar Feature and give your general feature a descriptive System Name.
2. Fill in the appropriate fields for your slide(s) and submit.
3. Publish any image assets added to the block separately. Unfortunately, the images won’t appear in the sidebar slideshows if you have not published them separate from the page(s) you add the block to.
4. The feature-block will be stored in the “sidebar-features" folder and you can choose to add it to any page by selecting the Feature block sidebar option.

Responsive Note:
At the tablet and mobile phone screen sizes, the Sidebar Feature does not display. Related Links, Contact Info and the Call-out move to the bottom of the page.
Draft

A “Draft” is exactly what the name implies: a working, but not complete, copy of a webpage with changes in progress. Drafts are automatically created and periodically updated as you work on a page.

That’s why you’ll see the options below appear at the bottom left of your editing window once you start editing the page.

To save a page as a draft, click the “Update Draft” button at the bottom of the Edit window.

Drafts are useful for when you’re working on a page, but need to stop and focus on something else for a while. You can access your draft on your dashboard. Or, the next time you edit the page, you can click on the blue "Draft" link that will appear in the alert box at the top of the edit window.

You can view your draft at any time by selecting “View” then the small “Draft” link at the top of the preview.

“Submit” Vs. “Publish”

When you make changes to any page, folder, or other asset in Cascade, you will see a button at the bottom of that window called “Submit.” Clicking the Submit button saves your changes in Cascade. If you don’t click “Submit,” your changes will not be saved.
When you return to that page or file in Cascade, even after logging out of the system, it will display the most recent updates that were submitted. **NOTE: Clicking the Submit button does NOT put your pages or files on the web.**

**Publishing** is the process by which your pages, folders, or other assets are copied from Cascade and put onto one of McCormick’s public web servers. Publishing a page, folder, or other asset, **makes that content visible on the web.** Conversely, unpublishing removes content from the web.

**Publishing Your Webpages**

Clicking “Submit” at the bottom of the page you’re editing saves your changes in Cascade. However, it will not yet appear on the web.

**After submitting your changes, your page still needs to be uploaded to the web server. That process is called Publishing.**

The publishing process is simple:

1. After submitting, click the “Publish” tab at the top of the page preview window. You can also hover over the page in the left navigation panel and click the white down arrow that appears next to the system name and select “Publish.”

2. You’ll see three areas of the screen, where you’ll configure the publishing process for your pages:
• **Destination:** This area shows to which servers you’ll be publishing your edits. Here you should see two options with check boxes. Those options are the two servers you can publish to:

  - “**Development Server**” is your site’s development server, on which you can test your website. You can view pages published to this environment at [http://mccormick-dev.tech.northwestern.edu](http://mccormick-dev.tech.northwestern.edu).

  - “**Live Server**” is the live server. **This option makes your content fully live and viewable by the public.**

Both will be checked by default. If you want your changes to go live immediately, select “Submit.” If you want your changes to show up on the development server only (for example, you might want to show someone a set of proposed changes to your website), uncheck “Live Server,” leaving only the “Development Server” checked.

**Options:** “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 necessary.

“Publish” and “Un-publish” mean exactly what they seem to:

- “Publish” updates the page you’ve altered on the server
- “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.

**Publishing is generally immediate and can be done as often as needed.**

To view your latest published changes in a browser, you may need to refresh the page or clear your browser’s cache so it pulls the most recent information from the server.
Writing for the Web

When creating web content, remember two important ideas:

- **Make your webpages easy to scan.** Visitors are generally looking to find the information they need quickly and move on.

- **Make your webpages easy for search engines to find.** This is called **Search Engine Optimization (SEO).**

Having excellent content isn’t of much use if users can’t locate it by searching. While there are no guarantees when it comes to SEO, implementing the following best practices may result in better search results.

In addition to improving SEO, the practices mentioned below will improve the experience of visitors to your website and are an important part of complying with accessibility standards for the web.

Optimize System Names

In Cascade, the names of the actual files and folders are called System Names. System Names also become part of the webpage’s URL that is visible in the address bar of web browsers. It’s important that they’re consistent and optimized for search engines.

System Names should always be:

- made up of **keywords** relating to the content
- formatted as **lowercase**
- separated by **hyphens**.

Do not use spaces or capital letters.

For example, "research-laboratory-staff" and "guidelines-for-faculty-publications.pdf" follow best practices for System Names.

It’s also best to avoid using dates in System Names. This prevents you from having to create a new file or change the system name if you need to update that information. For example, "student-handbook.pdf" is better and easier to maintain than "student-handbook-feb-2013.pdf." This also saves you the trouble of having to recreate the links to that document on your webpages.
Use Descriptive Page Titles
The page title is the phrase that appears in the top of the web browser bar while a user views a page. Search engines weigh page titles heavily when determining search results. This information also appears as the page title at the top of your webpage’s content area.

In Cascade, you can edit the title of your page under in the Edit tab, in the “Inline Metadata” section where it says “Title.”

Include Metadata
In Cascade’s page editor, below the Display Name and Title fields, you will see fields for Keywords and Description.

Include relevant search terms in the Keywords field. Separate words with commas and include more specific key terms first. This will also help search engines like Bing find your webpages.

In the Description field, type a descriptive, concise sentence explaining the contents of the page you’re working on. This description will appear on Google’s search results pages.

There is also a field here in the metadata to show or hide the page in the left navigation on the live website. Pages appear in the website navigation by default unless you select "No".
Optimize Your Copy

- Make your page copy simple and concise.
- Break it into more numerous small paragraphs.
- Use bullet points whenever possible.

Use Headers and Subheaders

Google's search engine (and Northwestern’s internal search appliance) gives more weight to pages containing search terms in header tags.

In addition, usability studies have repeatedly shown that users scan web pages, rather than setting out to read them from top to bottom. This means that concise copy and frequent (but judicious) use of subheadings is vital to making your pages useful to your readers.

Using headings and subheadings frequently is also important to building ADA-compliant pages: Screen readers used by people with visual impairments detect the HTML code that indicates headers (<h1>, <h2>, <h3>) and pay more attention to them than they do to ordinary paragraph copy — even if paragraph copy is set in bold or italic.

To create a heading or subheading in the Cascade content management system, select the text you wish to use as a header, then, in the Cascade Editor window, click the “Format” drop-down menu:

- For headers in the content areas of your webpages, use “Heading 2”
- For subheaders, use “Heading 3.”

The importance of a heading descends as its number ascends — information used as a Heading 2 should be more important than that of a Heading 3.
With this website template, you should not use any “Heading 1” formatting, since Cascade automatically formats your site title to that heading.

**Link Frequently and Use Keywords**

If you mention a page or document in your text, link to that page or document, particularly if it’s necessary to complete the task your visitor is trying to accomplish.

When choosing what words to activate as your link, it’s best to link to the key words in that sentence, not the entire sentence. Also, avoid writing “click here” as your link.

Take the example of this sentence with a “click here” link:

> “Professor Smith has worked extensively with the Smith Catalysis Laboratory (click here for more info).”

It’s better to create the link like this:

> “Professor Smith has worked extensively with the Smith Catalysis Laboratory.”

For detailed instructions on adding links in Cascade, see the “Inserting and Editing Links” section of this guide.

**It is also important to fill in the “Title” of your link.**

The text you enter into the “Title” field shows up as the “tool tip” text that appears over a link when a user hovers their mouse over it on a finished page.

Not only can this information be extremely helpful when navigating our website, it’s also a requirement to keep a web page compliant with ADA standards.
Use Alt Tags on All Images
Cascade requires you to fill in the “Alternate Text” field (producing what’s known as an “Alt” tag) when including any photograph. The Alt tag text becomes the image caption on the page. Therefore, it’s important to use complete sentences to describe what’s shown in a photo. Alt tags are a requirement for ADA compliance.

Module 3: Images, Documents & Videos
Preparing Images
Before you upload your images into Cascade, it’s important that they meet best practices for the web, which may require modifying image dimensions and file sizes before putting them into Cascade.

With the McCormick template you are using for your website, photos should follow the guidelines below and be cropped to the following dimensions prior to uploading into Cascade. Image sizes are measured in pixels (px). See the "Image Size Cheat Sheet"

Resolution of all images should be 72 pixels per inch (ppi). You can adjust the resolution of images in a photo editing program.

All McCormick staff can download the latest version of Adobe Creative Cloud software (includes Photoshop, InDesign, Illustrator, Acrobat, and more). Find instructions and info at http://www.it.northwestern.edu/software/adobe

There are a few important things to keep in mind when preparing images:
• Keep the **aspect ratio** (the ratio of the width of the image to its height) the same as the original file in order to prevent distortion. No squashed heads!

• Do not increase image dimensions. If you increase an image’s size to something greater than its original dimensions, this will create a pixelated effect. Start with a larger image and size down as necessary.

• If you’re using Photoshop, be sure to select “Save for Web & Devices” when saving your image and adjust the quality to keep the image’s file size under 60 kilobytes (60k) for larger photos.

Generally .jpg and .png file types work well for most images and photos. Use .gifs for smaller images with blocks of color or animations.

**Uploading Image/Doc**


2. The main panel will change to the “New File” panel. You can drag and drop your image or document file to this area or select “Choose File” to search for the file on your computer.

3. Once you’ve found and attached the file, the name of the file will be populated in the “System Name” field above.

   a. You can then edit the name of the file in the field. Be sure the **System Name** of your new file follows the

**Important:**

Do not move your images or documents into any other folder besides images/documents and their subfolders.

- Documents and non-image files go in your “documents” folder.
- Images go in your “images” folder.
guidelines mentioned above (e.g., use keywords, all lowercase, no spaces, words separated by hyphens). Also specify the proper file extension (e.g., .pdf, .doc, .xls, .txt)

b. **Parent Folder:** Click this link to specify in which “images” or “documents” subfolder the file will be stored. By default, any image file will be stored in the “images” folder and any document will be stored in “documents”

4. Click “Submit” to upload and save your file.

**Inserting Image on Page**

1. Place your mouse 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. This option is rarely used and is for images hosted by external sites.)

3. Next to Image, you will see two icons – a red cancel/delete icon and an image icon. Click on the image icon.
In the new image chooser window, select the images folder in the asset tree on the left. You can then either navigate to an existing image using the default Browse option, Search for an image, or click on the Upload option to upload a file. If you choose to upload a new image into Cascade, **always upload new images to the images folder**. If you are going to be working with a lot of images, you may want to create subfolders under the “images” folder to keep them organized.

4. Once you have the image selected, click Confirm to close the image chooser window. The image path will appear in the “Insert/Edit Image” window.

5. In the Alternate Text field, type in a text description of what the image depicts in a complete sentence. This required text becomes the image’s caption on the page and ensures that if the image doesn’t load properly, or if a screen reader is being used, the user can still understand what the content is.
While you can specify the width/height of the image here, it is highly recommended that you size photos outside of Cascade, as explained in the section of this guide called “Preparing Images”.

6. Click “Insert” for the image to be placed within the copy you selected.

**Working with Images**

Using the tools below you can shift the layout of your inserted images or edit and replace the images on your webpages.

**Assigning an Image Class**

If you’re planning on aligning an image to the right or left you must use the “Styles” menu to assign it a “class.”

**Aligning an Image to the Right or Left**

1. Select the image in the Edit window.

2. Click the “Styles” menu and select `image_floatRight` or `image_floatLeft`.

This will align your image to the right or left, and add padding around it, which keeps page text from getting too close.

**IMPORTANT:** Image styles are “additive,” meaning the code created when you choose a style or alignment is not removed if you choose another style for the image. To change an image style or alignment, you must first select the image and click the “Remove Formatting” tool from the tool bar. That step removes
the previous alignment. Then you can select a new style or alignment from the styles drop down menu

**Editing and Replacing Images**

You may want to alter an image once you’ve added it to a page:

- Select the image in the Edit window and either click the image icon in the toolbar or right-click and select “Insert/Edit Image.”
- You will then be able to change the image path, or use the options on the “Advanced” tab to add more space around the image.

If you have an alternate version of an image that you would like to upload in the place of the current image:

- Navigate to the existing image file in the “images” folder.
- Once the file is selected, click “Edit,” then use the “Upload” option to upload your new image. Cascade will point to the new image instead of the previous one.

Replacing your images assets this way instead of creating whole new files prevents clutter in your images folder.

**Inserting Video on Page**

You have the ability to embed a video from YouTube so that it plays on one of your site’s webpages.

To embed a video so it displays on one of your pages:

1. Go to that video’s page on YouTube.
2. Copy the video url from the address bar
In Cascade, select the Video Reel icon and paste the YouTube video url in the File/URL field. Uncheck "Constrain Proportions" in the next line and enter the proper video dimensions: **670x377** for the basic page.

*If you do not uncheck "Constrain Proportions" first, the system will autofill the wrong dimensions in the second field.*

Click Insert. An orange rectangle will appear in your editing window indicating its placement on the page. You can preview the video only after submitting your edits to Cascade or updating and viewing your Draft.

**Important:**

Do not use the **embed code** method of inserting videos on your page. You will receive an error message while previewing in Cascade and on the live site if published.

**Note:** If you do not enter the dimensions, the video will display with large black bars above and below it.
Image/Video Size Cheat Sheet

Images must be cropped to the desired size before uploading to Cascade, using Photoshop or other programs.

Always select “Save for Web & Devices...” in Photoshop. Adjust quality of image to balance image quality vs. file size. File size of images affects page load time and data usage on mobile. Note suggested file sizes below (e.g., 10k, 40k, etc.).

All image resolutions should be 72 pixels per inch.

Dimensions noted below are in pixels.

If your image is a logo or has solid bands of color, save it as a .gif file to reduce file size.

Homepage Header Image
These images must be **990 x 435px wide**. Try to keep file size below **120k**.

Basic Page Header Images
These images must be **770 x 375px wide**. Try to keep file size below **100k**.

Images in Body Area of Basic Pages & News Articles

**Full width images (spans full width of content area):**
Images that span the full width of the main content area should be **670 pixels wide**. Try to keep file size around **60-80k**, depending on image size. Height can vary.

**Images using “float left” or “float right” styles:**
If you want to wrap text around the image, when using “float left” or “float right” image styles:

Keep your image **no more than 250 pixels wide** (about half the content area). Again, height can vary.

Smaller images should be around **40-60k**.
**Images on Staff Listings Pages**
Thumbnail images should be exactly **100 x 100px**, around **10-12k**.

**Images in Sidebar Features**
Microsite and department site administrators may want to add sidebar feature slides on their sites. Slide images should be **242 x 170px**, around **30k**.

**News Articles Header Image/Slideshow Images**
Thumbnail images should be exactly **670 x 326px**, around **75k**.

**Videos in Body Area of Basic Page & News Articles**
Embedded YouTube videos should be **670 x 377px**.
Creating Section Folders
The first step in creating your site’s structure is to create the folders that organize your content.

When creating a new section of your site, you will use the Section Folder asset, which creates both a folder with an “index” page inside. Both the folder and index page must be edited. You’ll learn more about index pages in the next section.

It is highly recommended that you create a Section Folder in Cascade for each top-level link or section you would like to appear in your left-hand navigation, even if you only plan to have one webpage in that section. There are two reasons for using folders this way:

- Should you decide to add more webpages or content to a section of your site in the future, you will already have the folder in place that is properly named and ready to contain those additional pages.

- Should you decide to expand an area of your website from a single page to a section containing multiple pages, without a proper folder structure, you would need to change the System Name and location of that one page and possibly others. Since the System Name becomes part of a page’s URL, this could lead to multiple broken links for visitors who return to your site after the adjustment.

It’s best to start off with a folder structure that allows your website to grow.

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. For this example, we’ll create a “student-projects” folder which will contain pages telling visitors about McCormick student projects.

2. In the Menu bar, click “New,” and then click “Section Folder.”

3. Replace the default “section” name in “System Name” field with your new name. In this case, call it “student-
projects.”

**NOTE:** The system names of all assets in Cascade, including folders, should be lower-case and should substitute hyphens for spaces. **No Cascade Asset should contain spaces in its system name.** In addition, it’s important to use **keywords** in your System Names. The System Name becomes part of the URL path.

4. Make sure that the “Parent Folder” shown is the one where you want the new asset to “live.” You can change the Parent Folder by clicking the link next to the folder icon. This will open a new window that will let you choose the correct Parent Folder.

   In our example, since we want the “students” folder to appear as a top-level link in the site’s navigation, put it directly in the Base Folder which is indicated by [\]. If it is not chosen by default, select the folder and click “Confirm.”

5. The section marked “Inline Metadata” contains the Display Name for your new section folder and the option to display it in the left navigation. New folders you create will display in the navigation by default unless you select “No” in the dropdown.
A Cascade asset’s **Display Name** is the name that appears in the left navigation panel and the page’s breadcrumb navigation.

Enter a Display Name. Display Names should substitute “&” for the word “and” since space is limited in the left sidebar. In our example, you can name it “Student Projects.”

6. In the area marked “Metadata Set,” there are two checkboxes that should be checked by default:

   **“Include when publishing”** means that this folder and its contents can be published with the rest of your site, so they will appear on the live website.

   **“Include when indexing”** means that the pages within this folder will be included (and show up in) the left-hand navigation of your site.

7. Click “Submit.”

**Editing Index Pages**

Once your section folder is created, you’ll notice an “index” page inside it. The index page is the webpage that a browser automatically displays when a visitor navigates to a folder. It’s the default or “start page” for visitors to that section of your website.

- Edit the metadata of the index page.

  The **Display Name of the folder**, rather than the index page, will appear in the breadcrumbs and left-hand navigation of your website.

  The **Title of the page** will appear at the top of the content area of your page and also in the browser’s title bar.
To improve your search engine optimization (SEO), complete the Keywords and Description sections. (See “Optimize Your Content” for more information about improving SEO.)

- You must at least fill in the contact information in the sidebar region before clicking the “Submit” button at the bottom of the page.

Creating Webpages (Second-Level Navigation)

Pages that are not the “index” page in a folder will appear to a visitor as a second-level of links in your website’s left-hand navigation.

1. (Optional): Navigate to the folder where you want to create a new webpage. (If you don’t do this now, you can choose the destination folder in a moment.)

2. In the top blue Menu Bar, click “New,” then choose “Basic Web Page.” The “New Page” window will appear in your Main Panel.
3. Give your new webpage a **System Name**.

   **Since your System Name becomes part of that page’s URL, it is best to give your page a System Name that uses lowercase keywords separated by hyphens. Do not use any spaces.**

4. If you didn’t already do so in Step 1, select the “Parent Folder” link and navigate to the site folder where you want to put your new page.

5. Enter your new page’s Display Name and Title in the appropriate fields, and (if you have it ready) place your new page’s content in the main content field.

6. You must at least fill in the contact information in the sidebar region before clicking the “Submit” button at the bottom of the page. You can return to the page as many times as needed to edit and re-edit.

**NOTE:** You will need to manually publish your changes; see “Publishing Your Webpages” for more information on publishing pages.

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**Creating Third-Level Navigation**

The website template used by McCormick allows for the left-hand navigation to display up to three levels at once, which enables you to better organize areas with a large amount of content.

If you would like to create a third level of navigation, create a new folder inside one of your other folders. Then repeat the steps above to create a new section folder and addition pages as needed.

**NOTE:** You will need to publish all folders affected by your changes in order for the left-hand navigation on your website to reflect the latest updates.
Folder Order: Changing Your Site’s Navigation

This section explains how to change the order of folders, subfolders, and assets in Cascade.

The left-hand navigation of your website is determined by the order of the folders and assets in Cascade. You can reorder the folders and the webpages contained within those folders, which will then change the order of links in your site’s left-hand navigation.

In this example, we’ll be changing the left navigation of a subsection of the site.

1. In the navigation panel, click on a desired subfolder (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 re-ordering 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.

NOTE: In order for these changes to display on the web, you must re-publish the entire folder you’ve re-ordered. See “Publishing Your Webpages” to learn more about publishing your website folders.

Editing Footer Links

There is a block in your navigation called "dept-footer" where you can edit/add links that appear in the footer of your website.

In the editing view of this asset, click the green + (plus sign) in the Links section to add a new Link and fill out the corresponding fields. You should choose
an Internal Link **OR** enter an External URL. Use the blue arrows to rearrange the order the links appear in. The red minus sign will remove links from the footer.

After editing and submitting the footer, you must publish the Base Folder to update the website.

**Copying Folders/Files**

To copy a single folder or file, click on the folder or file and select **Copy** from the top menu. Specify the new system-name for the copied asset and new location. Submit.

To copy multiple folders or files at once:
- Click on the parent folder of the asset
- Check the boxes of those you want to copy
- In the dropdown box below the asset list, select **Copy**
- Specify copy location

**Moving Folders/Files**

To move a single folder or file, click on the folder or file and select **Move/Rename** from the top menu. You can also hover over assets in the left navigation panel and click the white down arrow that appears. Then, select “Move/Rename” from the contextual menu. Specify the new location of the asset where it says "Parent Folder." Submit.

- Notice the **Unpublish Content** box is automatically checked. This will remove the page from its original location on the live site as well as Cascade. You will need to republish the asset once moved.

To move **multiple** folders or files at once:
- Click on the parent folder of the asset(s)
- Check the boxes of those you want to Move
- In the dropdown box, select **Move**
• Specify the new location of the asset(s)

**Publishing Folders/Files**
You can publish **individual** pages, **multiple** pages, and **entire** folders.

- **Individual** pages
  - Click the **Publish** tab on the page.
  - Choose which server to publish to (**development** or **live** or both)
  - Request will be sent to the automated publisher
  - Any images on the page will also be published, no need to publish them separately

- **Multiple** pages
  - Select the parent folder of the pages to be published
  - Check the boxes of the pages to be published
  - In the dropdown, choose **Publish**
  - **Cannot** choose which server to publish to (**must** publish to all)

- **Entire** folders
  - Select the folder to be published
  - Click the **Publish** tab on the page.
  - Choose which server to publish to (**development** or **live** or both)

You can also hover over assets in the left navigation panel and click the white down arrow that appears and select “Publish” from the contextual menu.

**Deleting Folders/Files**

- Click on the asset
- Click **More >> Delete** in the top page tabs.
- Check **Un-publish Content** while deleting to remove the page from the live site as well as Cascade. **IMPORTANT:** If you do not check this box the page will remain on the site with no way to edit it in the future.
- Cascade also displays alerts for what pages/assets are linking to the file and will need to be updated before deleting.
- Deleted files stay in **Recycle Bin** for **15 Days**

You can also hover over assets in the left navigation panel and click the white down arrow that appears and select “Delete” from the contextual menu.

**Development Server**
The McCormick site has a development environment which is essentially a copy of the entire site accessible at [http://mccormick-dev.tech.northwestern.edu](http://mccormick-dev.tech.northwestern.edu). This location is not indexed by Google and can only be accessed by sharing its url.
The development server can be useful for publishing pages for others to review who do not have access to Cascade before making that page live. See more details on this in the "Publishing Your Webpages" section of this guide.
Module 5: Department Page Types

People Listing
People listing pages are a great way to feature anyone in your department (faculty, staff, students). They allow you to upload an image of that person, along with their contact information, and a description of what they do for your department.

To create a people listing page first go up to your toolbar and select “New”. After selecting the dropdown menu select “People Listing”.

After selecting the “People Listing” option from the dropdown menu you will be transferred to your new page.

First, fill out the system name (all lower case, separated by hyphens) of your page. And, chose the parent folder i.e. the location in the website where this new page will exist. Remember, the system name becomes part of the page’s url.

Next, fill out the inline metadata. Learn more on how to fill out this section in the "Include Metadata" subsection of this guide.

NOTE: Anything with a yellow star next to it has to be filled in before you can successfully submit and save the page (First Name, Last Name, Contact).

Main Content
The People Listing page has the same options for a header image/slideshow, jump menu and body content as a regular page. However, if you do not need to include any content before the listing of people than you can start entering content in the People Group area. This is where you will be adding people, uploading their images, describing their role, and filling out contact information.
Attach a **photo cropped 100px by 100px** of the person you’d like to feature. Remember, images must be cropped and uploaded to Cascade **before** editing the listing page.

Fill out the first name, last name and any other additional information that you would like. We suggest filling out all fields if possible.

### Adding Groups

If you would like to format your page with different headers or groups all you have to do is **click on the green + (plus sign)** under Main Content >> People Group. This will add an additional header and group to insert and organize photos.
For example, if you are creating a people listing page for your master’s and PhD students you could organize them by creating two separate headers (Master’s Students, PhD Students).

**Layout Options**

You have the option to display people’s information (to the right of their image) in one or two columns for each group you add to the page. The layout defaults to two columns. You may want to use only if two columns may be severely uneven.

**Adding People**

You are most likely going to have several people listed on this page, so it is important to know how to add additional people. All you have to do is **click on the green + (plus sign)** under Main Content >> People Group >> Person.

Every time you want to add another person all you have to do is **click on the green + (plus sign)** and it will add another content field.
Deleting People

If you have added too many people or have a person who is no longer with your department all you have to do is **click the red** – (subtraction sign) on that person’s content area.

Changing the Order of People Listed

If you would like to change the order of the people you have created you have to **select the blue down arrow** or **the blue** ^ (up arrow) that is located next to the red – (subtraction sign). You can move people up and down to organize your page alphabetically or by hierarchy.

Sidebar

The sidebar regions of this page are the same as the basic page type. You must at least fill in contact information before submitting the page.

Example:

NOTE: It is important for you to update this page when people change positions, leave the department, or get additional responsibilities.
Linking to People

If you have many people listed on your page, you may want to link directly to a person rather than make a website visitor browse the entire list to find a specific person. To link directly to a person on your people page, at the end of the page's url, add a hash mark # followed by the first and last name of the person in all lowercase letters and separated by hyphens:

url.html#firstname-lastname

Our example page is the McCormick marketing contact page at http://www.mccormick.northwestern.edu/marketing/contact-our-team/index.html. To link directly to Emily Ayshord, we'd add #emily-ayshford to get http://www.mccormick.northwestern.edu/marketing/contact-our-team/index.html#emily-ayshford. Now, when we follow this url, the page view starts right above Emily’s details:

IMPORTANT: If the person has any spaces within their first or last name, replace that space with a hyphen and keep all punctuation!

For example, to link to a person whose first name is "J. Edward" and last name is "Colgate", the hash you'd add at the end of the url would be #j.-edward-colgate.
Faculty Listing

Faculty listing pages are a great way to feature your entire list of faculty in one place. These pages can feature faculty one of two ways:

- Pull profile information from the main McCormick site
- Enter relative information in fields for those people who do not have core or affiliated profiles on the main McCormick site.

Make sure that the faculty you want to have featured on your faculty listing page have profiles on the main McCormick site first (if applicable) before creating or making additions to Faculty Listing pages.

Creating a Faculty Listing Page

To create a faculty listing page, go to the toolbar and select “New”. Select “Faculty Listing” from the dropdown menu.

After selecting the “Faculty Listing” option from the dropdown menu you will see the fields for your new page.
First, fill out the system name (all lower case, separated by hyphens) of your page. And, chose the parent folder i.e. the location in the website where this new page will exist. Remember, the system name becomes part of the page’s url.

Next, fill out the inline metadata. Learn more on how to fill out this section in the "Include Metadata" subsection of this guide.

NOTE: Anything with a yellow star next to it has to be filled in before you can successfully submit and save the page (First Name, Last Name, Contact).

**Body Content**

The body content section allows you to insert important information before your faculty profiles. If there is anything important that a user needs to know before viewing your faculty members, insert it here.

**Faculty Groups**

**Adding Headers**

If you would like to format your page with different headers or groups all you have to do is click on the green + (plus sign) under Faculty Group - Header. This will add an additional header and will allow you to organize your faculty listing page.

![Faculty Group](image)

For example, if you are creating a faculty listing page for your core, affiliated, and emeritus faculty you could organize them by creating three separate headers (Core Faculty, Affiliated Faculty, Emeritus Faculty).

**Adding Faculty Members**

You will most likely add several faculty members on this page, so it is important to know how to add additional faculty. Click on the green + (plus sign) under Faculty Group >> Faculty Member.
Cascade is going to ask you if the faculty member has a McCormick profile. "Yes" will be selected by default. Click the magnifying glass icon at the end of the line where it says "Choose profile from McCormick directory." A new window will open up to select a page.

This window is set to view pages on your department site. However, faculty profiles, both core and affiliated, are stored on the main McCormick site. To choose pages from the main McCormick site, select "McC-McCormick" from the gray dropdown at the top of this new window.

The left folder structure will update to reflect the main McCormick site. Navigate to the "research-faculty" folder toward the bottom of the tree. Click the plus icon to expand it, and then click the plus icon next to the "directory" folder. Core McCormick faculty profiles are stored in the "profiles" folder. Affiliated faculty profiles are in the "affiliated" folder.

Once, you've found the individual page that corresponds to the faculty member, click it and then click "Confirm". The individual faculty member's information will now be included on your department's Faculty Listing page.

Every time you want to add another faculty member all you have to do is click on the green + (plus sign) and it will add another content field.
If the person you'd like to feature does not have a McCormick profile and you cannot create an affiliated profile for him/her, you will have to enter their information on this page. Select "No" for "Does this faculty member have a McCormick profile?" and fill out the appropriate fields.

**Changing the Order of Faculty Members**
If you would like to change the order of the faculty you have created you have to select the blue down arrow or the blue ^ (up arrow) that is located next to the red – (subtraction sign). You can move faculty members up and down to organize your page alphabetically or by hierarchy.

**Sidebar**
Once you have your faculty members organized, fill out the sidebar information. This is one of the last steps to creating the page. Make sure to fill out the contact info (mandatory) along with any related links and call-outs.

Example:

NOTE: It is important to update this page when new faculty members join your team, when they change positions, or leave the department.

*You can link directly to a specific faculty member in the listing page by adding #firstname-lastname to the url. See "Linking to People" p. 59 for more details.
Faculty Profiles

Faculty profiles for all McCormick faculty -- whether they are tenure-track, tenured, or clinical faculty with paid, budgetary appointments OR are affiliated faculty (e.g. department adjuncts, lecturers, emeritus, research faculty, courtesy appointments, etc.) – are kept in the main McCormick site (McC-McCormick) in Cascade:

Base Folder / research-faculty / directory /

Budgetary / Tenure-track faculty profiles are kept in the “profiles” sub-folder.

Affiliated faculty profiles are kept in the “affiliated” sub-folder.

Budgetary / Tenure-track Faculty Profiles (e.g. Core faculty)

Profiles for McCormick budgetary faculty are created by Jason Grocholski (j-grocholski@northwestern.edu).

Once the profile has been created, department staff may add to or edit the content at any time, with two exceptions:

- Only Jason Grocholski may edit the official position titles of faculty members. Department staff should not change faculty titles in the McCormick faculty directory.

To request a title change, email Jason (j-grocholski@northwestern.edu).
• To change a faculty’s preferred **profile photo**, please email the ORIGINAL photo (the raw, uncropped image) to Christa Battaglia in the marketing department (c-battaglia@northwestern.edu).

Marketing will then ensure that the photo is cropped and connected to the correct faculty profiles as needed.

If a faculty member has public information in the Annual Report system – including their CV, publication lists or detailed research descriptions – that information is automatically fed to their McCormick faculty profile in Cascade and will appear on the profile page, once the profile has been republished.

To edit that information, you’ll need to log into the Annual Report system. See below for more information about that process.

If a faculty member is not in the Annual Report system or they have not yet been added to it, then all their information is contained and managed from their profile in Cascade.

In either case, a faculty’s basic information (see below) is kept in their faculty profile in Cascade.
Updating Basic Faculty Profile Information

Department staff may edit faculty members’ basic information on their profile in Cascade, including:

- name
- contact information
- affiliation
- education
- biography
- research interests
- significant recognition
- significant professional service
- patents

To edit a faculty profile, choose that person’s profile from the “profiles” folder and select “edit”.

Under the edit window, you may change their display name if needed (please format display name as “Last name, First name”).

Under the Departments area, faculty profile should already be connected to their department(s).
If you need to add a new **department affiliation**, you may do so by using the “+” to add a new Department group. Choose the appropriate department from the drop down menu.

*Note: The biography field can be used to add background and personal information not covered by other areas.*

If this person is the **Department Chair**, select “yes” next to the question “Is this the Department Chair?”

To add **centers** with which the faculty member is involved, type them into the field under “Centers.” Use the “+” button to add additional centers.

To add or edit **education** information, enter it into the field called “Education”. Please be mindful of proper formatting, as this information will appear on the faculty profile exactly as it is entered into Cascade.
Fill out the field titled **Research Interests.** This should be a brief summary of the interests, topics, or research area(s) that the faculty member practices. This content will appear on any pages that show faculty directory listings.

The next three sections enable you to list additional **optional** information for a faculty member:

**Courses Taught** – the titles of any courses that faculty regularly teaches

**Significant Recognition** – the names/years of professional awards, honors or recognitions for that faculty member

**Significant Professional Service** – any roles or honorary positions held by the faculty member such as magazine editor or board member

For each of the above three areas, clicking the “+” button under each category will enable you to add another line of information. **For these fields, list only one item, achievement, or recognition per line.**

Use the **Patents** field to list or describe any relevant patents filed or held by the faculty member. Please be mindful of proper formatting, as this information will appear on the faculty profile exactly as it is entered into Cascade.
**Other Information** is an area where you can show any additional information for that faculty member, such as “In the Classroom” to explain their teaching philosophy. Again, please be mindful of proper formatting, as this information will appear on the faculty profile exactly as it is entered into Cascade.

**Featured Items**

This section is an optional area that allows you to include additional documents or links on a faculty profile. It will display on the left side of the profile, underneath the faculty’s profile photo.

**Section Title** creates a title for the whole area (e.g. “Featured Projects” or “Publications”).

**Caption** is where you should enter the text that will appear on that link, such as “View a list of projects” or “Download a complete list of publications”
**Linked Document** is where you can use the page chooser icon to select a PDF or other file to link to.

You also have the option of putting a website address in the **URL** field, instead of choosing a PDF or other file, if you’d like to link off to an external website.

Use the “+” or “-“icons to add or remove additional documents or links in this area.

**Updating Annual Report**

Faculty CVs, publication lists, and detailed research descriptions are kept and managed in the "**McC Faculty Directory Info**" section of the Annual Report.

This content is accessible and editable by faculty and department staff at any time throughout the year.

Edit this information by logging into the Annual Report (https://ar.mccormick.northwestern.edu) and clicking on "McC Faculty Directory Info" in the left sidebar. Department staff may need to select "McC Faculty Directory Info" again, once you have chosen the faculty member's name.
**Affiliated Profiles**

Academic department staff may create a new affiliated faculty profile at any time. All Affiliated Profiles are kept under the **McC-McCormick** base folder.

**Creating a new Affiliated Profile**

To create a faculty listing page, select the affiliated folder in **research-faculty/directory/affiliated** - when the folder is selected, the folder title should have a blue highlight as seen below.

Next, click “New” on the Cascade sidebar as seen below. Select “Faculty Profiles”, then select “Affiliated Faculty Profile”.

After you select the “Affiliated Faculty Profile” page it will bring you to your new page. Make sure that your new page is kept under the **research-faculty/directory/affiliated** parent folder.

*All of the Affiliated Faculty profiles have to be saved in that parent folder.*

**Inline Metadata**

Next, you have to fill out the Inline Metadata. This includes the Display Name, Keywords, Description, and Core/Affiliated Tags. Make sure your Display name is
formatted as Last Name, First Name. Also, make sure that you select the “Affiliated” tag, although it should be preselected.

Content

Please fill out as many fields as possible. Obviously some are more important than others (name, email) but we encourage you to fill out as much as possible in order to let the user get important information about the affiliated faculty member.

Also, if the affiliated faculty member has a profile photo please attach it. Make sure you have already uploaded the photo/photos in Cascade before attaching them on this page.

Images

All profile photos associated with affiliated profiles should be stored in "images/research-and-faculty/directory/affiliated" on the McC-McCormick site. Not your department site. Go to New >> Image – Affiliated Faculty – JPG PNG to add images. They will default to the proper location on the McCormick site. Image sizes are noted next to the appropriate profile photo fields.

Additional Content

Cascade offers the following options:

*NOTE: You do not have to fill out all of these fields but we encourage you to fill out the fields that are important to the faculty member.

Titles: Please fill out the Job Title(s) of the Affiliated Faculty Member.
**Departments:** Please select the dropdown menu and select the department that the faculty member is associated with.

**Affiliations:** If the faculty member is affiliated with a Masters of Science program, please select the dropdown menu and the corresponding program.

**Websites:** If the faculty member has a research website or personal website please paste in the URL and text.

**Centers:** If the faculty member has any research centers please enter the name of that center accordingly.

**Education:** Please enter which degrees the professor has earned, along with the school and year. (Ex: BS Mechanical Engineering, Johns Hopkins University, 2007)

**Biography:** Please fill out basic biographical info for this faculty member not covered by the other sections in here. See pg. 68 for more information.

**Research Interests:** Please fill out the faculty member’s research interests.


*Also, if the faculty member has a CV or Publications list you can upload them in this section.

**Courses Taught:** If the faculty member is teaching any specific course fill them out in this field.

**Significant Recognition:** If the faculty member has won any awards, or received any significant recognition, please fill it out here.

**Significant Professional Service:** If the faculty member has any significant professional service, fill it out accordingly.

**Patents:** If the faculty member has any patents list them in the text box.

**Featured Items:** If the faculty member has any projects they’d like to feature, please fill out the project title, the caption, the document or the URL. This will appear directly under their profile picture.
Example:

FACULTY DIRECTORY

MARK FLEMING

EDUCATION
PhD Theoretical and Applied Mechanics, Northwestern University, 1997
MS Theoretical and Applied Mechanics, Northwestern University, 1994
BS Mechanical Engineering, University of Nebraska-Lincoln, 1992

RESEARCH INTERESTS
Dr. Fleming teaches Advanced Finite Element Analysis and is a core faculty member of the Simulation-driven Engineering (SDE) program. He is a Principal Engineer at Caufield Engineering and is a mechanical engineer specializing in engineering design, analysis, and accident investigation for vehicles and other machines. He is currently completing a book on design review and evaluation of products, machinery and product testing, accident investigation and reconstruction, and failure analysis. Prior to joining Caufield Engineering, Dr. Fleming gained experience working as an engineering consultant at Peckar Engineering and IFC, and as a design engineer at Coca-Cola Company/ONH. Dr. Fleming received his PhD in theoretical and applied...
**News Articles**

There are two options for publishing news related to your department: create an internal article or link out to an external URL for news items that exist on other websites. Previously, there was a third option to pull a main McCormick site article into your department site. This is now an automatic process and McCormick articles tagged for your department will automatically show up in the news feed.

News articles are stored in news/articles/[year]. New articles created are stored in this location by default.

To create a department News Article, go to New → News Article

Update the System Name field with appropriate text (lowercase and hyphens between words). Give the article a Title and Summary. The Title appears at the top of the article. The Summary does not appear on the article page. Rather, it appears in the news feed displayed on the department news index page and homepage.

The keywords and description fields are for search engines. Follow the same rules as the basic page for these fields.

The Start Date will appear on the article under the Subtitle and it indicates when the article can be indexed and published.

The URL field should only be filled out if the news asset will link out to a news source that is external to the McCormick website. If so, the web address, beginning with "http" should be entered here.
The second option is to create an original article. In this case, all of the fields mentioned above **EXCEPT the URL field** should be filled out. Then, content should be entered in the **Department News Article** area.

![Department News Article](image)

The **Subtitle** appears on the news article page under the Title on the news article (followed by the date). The text of the article should be entered in the **Story Content** area.

An original article can feature a header image, slideshow or video. To enter media, click the **Featured Media** section to expand and then click on the Video or Images option. Note: these options are mutually exclusive.

If Video is chosen, select "Yes" for "Would you like to embed a feature video?" and then follow the instructions for "Inserting Video on Page"
Captions are required for all featured video and images. The fields for the header image or slideshow are set up in the same way as those for the basic page. Note the different sizes for the slideshow images.

If you are planning to share this news article to Facebook, please add a 200px x 200px image file to the Thumbnail Image field at the top of this region. This image will be shared alongside the article title, subtitle and link on Facebook.
If you have a related link, enter the text and url in the appropriate fields.

It will display at the bottom of the article in this style:  

**News Article Sidebar**

Below is a sample news article on the Mechanical Engineering site. The right sidebar of every department news article displays the **four of the most recent news stories** from a pool of McCormick marketing articles tagged for the specific department and original articles from the department. Links to the stories appear in reverse chronological order.
The "Join Us" section in the sidebar displays the department's social media and is controlled from the department's homepage. Below that is a region to link to a news related item such as a newsletter signup. The Header, brief teaser line, button text, and link can all be customized. This bottom area is the only region in the sidebar you have control to edit.

You can edit these fields in the `news/news-sidebar` asset.
Get our news delivered to your inbox.
**News Index**

The Department "news/index" page displays a reverse chronological list of the most recent marketing articles tagged for the department and the most recent original articles created by the department. News Articles can be searched by Keyword and Year. The sidebar regions of this page can be edited just as those of a basic page. No content should be entered in the main content areas of this page.

Note: It may take up to an hour for newly created articles to appear in this index.
Event Listing

Department Events are listed on the "events/index" page of the website. Events are added/edited through planitpurple.northwestern.edu. No action is necessary inside Cascade to update the events feed. Events added in planitpurple will appear on the event listing page and the homepage of the department website within three hours.

The sidebar regions of this page can be edited just as those of a basic page. No content should be entered in the main content areas of this page.
**Course Listing**

The Course Listing page displays a searchable index of all course descriptions entered in Cascade. Each row of the table corresponds to an individual course description page asset and includes a link to that asset. Introductory text, which will appear below the page title, can be entered on this page. All other information displayed here is pulled from the individual course description. This page should be republished anytime an individual course description is updated, added or removed.

The order courses appear in the table can be controlled through the Folder Order of the descriptions folder. To do this, select the descriptions folder and select "Order" in the new pane. The courses assets will display in the same order as the Course Listing. Reorder any course by clicking the area to the right of the course number and dragging it to a new position.
Course Description
All course descriptions are stored in the "courses/descriptions" folder.

To create a new course description, go to New >> Course Description. Update the System Name, Display Name and Title fields. You cannot submit or save the page asset until these fields have been filled out.

Fill out the Course Subject, Course Number, and Title. Users should select whether they would like the Course Subject to display before the Course Number in the table of the Course Listing. The default setting hides the Course Subject on the Course Listing.

Then, fill out the Quarters>>Quarter section for each quarter taught this academic year. Check the corresponding quarter in the Offered field. If it's not being taught this year, use one quarter section and select “None” for the Offered field. The Course Number and title will still appear in the table, but nothing will appear in the quarter fields. If you do not want the course to appear in the table at all, you can select Edit>>System and then uncheck "Include with indexing." **Do not delete or move course assets once created.** Other sites may be linking to your assets and you should receive a warning indicating what pages are linked if you attempt to delete them.
To add another quarter, click the green + (plus sign).

Enter the prerequisites, course description text and attach any syllabi in the fields below the Quarters section. Information from these fields will be displayed only on the course page, not on the Course Listing.

For changes to the subject, title and quarters offered to appear, users should publish both the description page and Course Listing.

Example:

** COURSE DESCRIPTIONS **

**ME 202: MECHANICS II**

**QUARTER OFFERED**
Winter : Sec 20 MTWF 2:00-2:50pm; Sec 21 MTWF 3:00-3:50pm ; C. Sun

**PREREQUISITES**
GEN,ENG 205-4

**DESCRIPTION**
Friction, Kinetics of rigid bodies in planar motion. Equilibrium of rigid bodies, bodies, dynamics of rigid bodies in planar motion. Kinetics of particles. Mom
On the Department Homepage, there are many regions that are automatically updated or filled in for you. The regions outlined in red are those which you can edit. Detailed explanations on how all the regions function follow.

1. Feature Slideshow
2. Main Content
   a. Introduction Area
   b. Area of Study WYSIWYG
3. Sidebar
   a. Top News
   b. Callout & Optional WYSIWYG
   c. Social Media
Feature Slideshow

The Feature Slideshow on the department homepage includes features you create and McCormick news articles (which marketing will add to your site). The slideshow can feature **up to six slides**. It has the same controls as the basic page slideshow. You can choose to randomize which slide appears first when the page loads, automatically advance the slides and modify the intervals between each rotation.

When adding a new slide the source of "Department Feature" will be chosen for you. Fill out all the appropriate fields for the slide including:

- **Link Type**
- **Internal or External Link**
- **Headline** – Displays in bold, capitalized letter across the bottom half of the slide
- **Float Text** – To select whether the text floats above the left or right side of the slide image. If the subject of your photo is on the one side, you should likely float the text on the opposite side.
• Summary – Displays below the headline in normal text at the desktop size. It does not display at mobile sizes. 150 character maximum!

• Link Text – This should be a short action for your readers such as "learn more". The link text defaults to "read more" if no other text is entered.

• Image - This image must be cropped to 990x435px!

• Alternate Text – This text describes what’s inside the image for search engines and does not display.

You'll notice that some slides have been filled out for you and have a source of "McCormick News". You have full control to edit these slides. Edit the Headline text in the appropriate field. If you’d like to edit anything else about the slide, select yes for "Do you want to change the Summary, Image etc?" and the fields for those items will appear for you to edit.

Add slides with the green plus icon that appears at the top left. Remove them with the red minus icon and reorder slides with the blue arrows.

Main Content
The main content area on the department homepage is made up of all the content in the left column under the slideshow. It includes an introduction area, areas of study tables and WYSIWYG content sections below each table.

Introduction Area
Content is entered in the Introduction Area of the homepage through a WYSIWYG editor. You can include text, links, images and more in this area.
**Areas of Study Tables**

The Areas of Study Tables include any undergraduate, graduate and affiliated programs for your department. These tables are automatically placed on your homepage.

If you have an edit for these tables, email web-updates@mccormick.northwestern.edu.

**Areas of Study WYSIWYG**

You can include content related to your department programs below each areas of study table. To do this, select "Yes" for "Include optional ___ programs content(if applicable)" in the corresponding main content region. The fields in the graphic below correspond to the area below the Undergraduate Programs table.

You cannot include any media (images/video) in these areas.

**Sidebar**

The sidebar area on the department homepage is made up of all the content in the right column under the slideshow. It includes recent news, optional content areas, events and social media.
**News**
The homepage news feed will automatically feature the latest four news stories created by your department or created by McCormick marketing and tagged for your department. This will keep fresh news content on your homepage without a need to manage it. However, if you'd like to feature news in this area at the top of the list that is not being pulled in automatically, you have the option to create up to two Top News items from the homepage edit window.

To create top news items, select "Yes" for "Do you want to create a custom news item to appear at the top of the feed?" Then, fill in the text to display in the Link Text field and the link details in the Link Type fields.

Remember, only four total news items can display at once. So any added here will remove one from the bottom of the feed.

**Callout & Optional WYSIWYG**
A Callout is the purple arrow with text in the sidebar. To include one, select Sidebar >>Callouts. Fill in your text in the WYSIWYG editor and then fill out the link details below the window.
The callout is optional and content below will move up in the sidebar if one is not included.

The other optional area for custom content in the sidebar displays a purple header and text below. To enter content in this area, select Sidebar >> Callouts >> Optional Content Area. Enter the Header text in the Header field and the text in editor window below.

Content below the optional WYSIWYG will move up in the sidebar if no content is entered.
**Events**

Events are added/edited through planitpurple.northwestern.edu. No action is necessary inside Cascade to update the homepage events feed. Events added in planitpurple will appear on homepage of within three hours.

**Social Media**

The social media accounts added to the homepage also display on the News Index and News articles of the department site. To add new social media, select Sidebar >> Social. Select the type of account from the drop down and then enter the account username. The appropriate icon will appear on the appropriate pages.
Module 6: Other Helpful Tips

Versions
- Cascade retains the 50 most recent versions of an asset.
- To view previous versions, click the More tab and click Versions.
- You should be presented with a table of all previous versions.
  - When they were last modified and who modified them.
- To restore an older version, Activate that version.
- Once activated, the version can be published or edited.

Creating Line or Paragraph Breaks
- In WYSIWYG editor
  - Enter creates a new paragraph.
  - Shift+Enter creates a line break.
- If the text appears to be larger than normal make sure the block of text in formatted for paragraph.

When writing a single line of text, hit Enter to ensure that text is in a paragraph.

Basic Troubleshooting
Here are a few troubleshooting tips to try if you find a webpage isn’t loading correctly on the web:

After checking that all the links and formatting are correct on your page in Cascade, be sure you have published the page.

Try publishing the page a second time if:

- the page isn’t displaying the same on your website as it appears in Cascade.
- the page isn’t loading correctly.
- there are broken links on the page.

If the page still doesn’t load correctly after publishing, it might be a caching issue related to your Internet browser:

- Try to reload the page in your browser without cache by selecting Ctrl+F5 (for Windows) or Cmd+Shift+R (for Mac).
If the page still doesn’t load correctly, it may still be in the process of publishing. You can **check the publisher queue** in Cascade to see if that page (or other assets) is still in the process of publishing.

To check the publishing queue:

- Select the Cascade “C” swirl on the top left of the toolbar, then select “Publisher” and select “Active Jobs.” There you can see what assets are in the process of publishing.

If the page has been published and the problem still remains, or the publisher appears to be stuck, you may **contact McCormick IT** at web-updates@mccormick.northwestern.edu. IT may be able to address the problem.