

Updating Main McCormick Site in Cascade

A Guide for Site Administrators

**By the McCormick Office of Marketing and Communications
and IT Resources**

Version 1.0

Updated October 13, 2017

Table of Contents

What's Responsive?	5
Module 1: Cascade Basics I – Getting Familiar	8
Logging in to Cascade	8
The Home Screen	9
The Toolbar	10
The Sites Menu.....	11
The Add Content Button.....	12
The Navigation Panel.....	13
The Contextual Menu	15
The Trash Bin.....	15
The Dashboard	16
My Sites Widget	16
My Upcoming Tasks Widget.....	17
New Content Widget.....	18
My Content Widget.....	19
Stale Content Widget	19
Notification Widget.....	20
Reconfigure Dashboard	20
Assets	20
Naming Files, Folders, and Webpage Assets	21
Module 2: Editing a Basic Page	22
Page Location/URL.....	22
Inline Metadata	23
Header Image/Slider	24
Jump Menu.....	25
Editor Toolbar - WYSIWYG.....	27
Basic Formatting.....	29
Headings and Subheadings	29
Copying and Pasting	30

Inserting and Editing Links	31
Anchor Links	32
Sidebar Options.....	33
Draft.....	35
Save & Preview Vs. Submit	36
Submit Vs. Publish	36
Publishing or Un-publishing Your Assets	37
Publishing the Entire Website.....	40
Writing for the Web.....	41
Optimize Asset Names	41
Use Descriptive Page Titles	42
Include Metadata	42
Optimize Your Copy	42
Use Headers and Subheaders	43
Link Frequently and Use Keywords.....	44
Use Alt Tags on All Images.....	45
Module 3: Images, Documents & Videos	46
Preparing Images	46
Uploading Image/Doc	47
Inserting an Image on Page	49
Working with Images	50
Assigning an Image Class.....	50
Aligning an Image to the Right or Left	50
Editing and Replacing Images	52
Inserting Video on Page	53
Image/Video Size Cheat Sheet	55
Header Images	55
Images in Body Area of Basic Pages.....	55
Images on People Listings Pages	55
Images in Sidebar Features.....	56
Videos in Body Area of Basic Page	56

Module 4: Cascade Basics II – Structural Additions/Changes	57
Creating Section Folders	57
Editing Index Pages	60
Creating Webpages (Second-Level Navigation)	61
Creating Third-Level Navigation	62
Folder Order: Changing Your Site’s Navigation	63
Copying Folders/Files	64
Moving Folders/Files	64
Renaming Folders/Files.....	67
Publishing Folders/Files	69
Deleting Folders/Files	70
Development Server.....	70
Module 5: Other Helpful Tips	71
Mark Content for Review.....	71
Versions	72
Creating Line or Paragraph Breaks.....	72
Basic Troubleshooting.....	73

What's Responsive?



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.

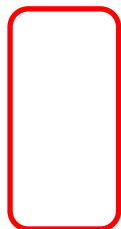
The layout of the page changes and items in the page shrink, shift around and collapse as the viewing screen size decreases. Because the layout transforms for different screen sizes, it's important not to refer to things on the page as “to the left,” “above,” “below,” or “to the right.” The position 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:

Desktop Size

Main Content Area

Includes optional header image/slideshow and body content

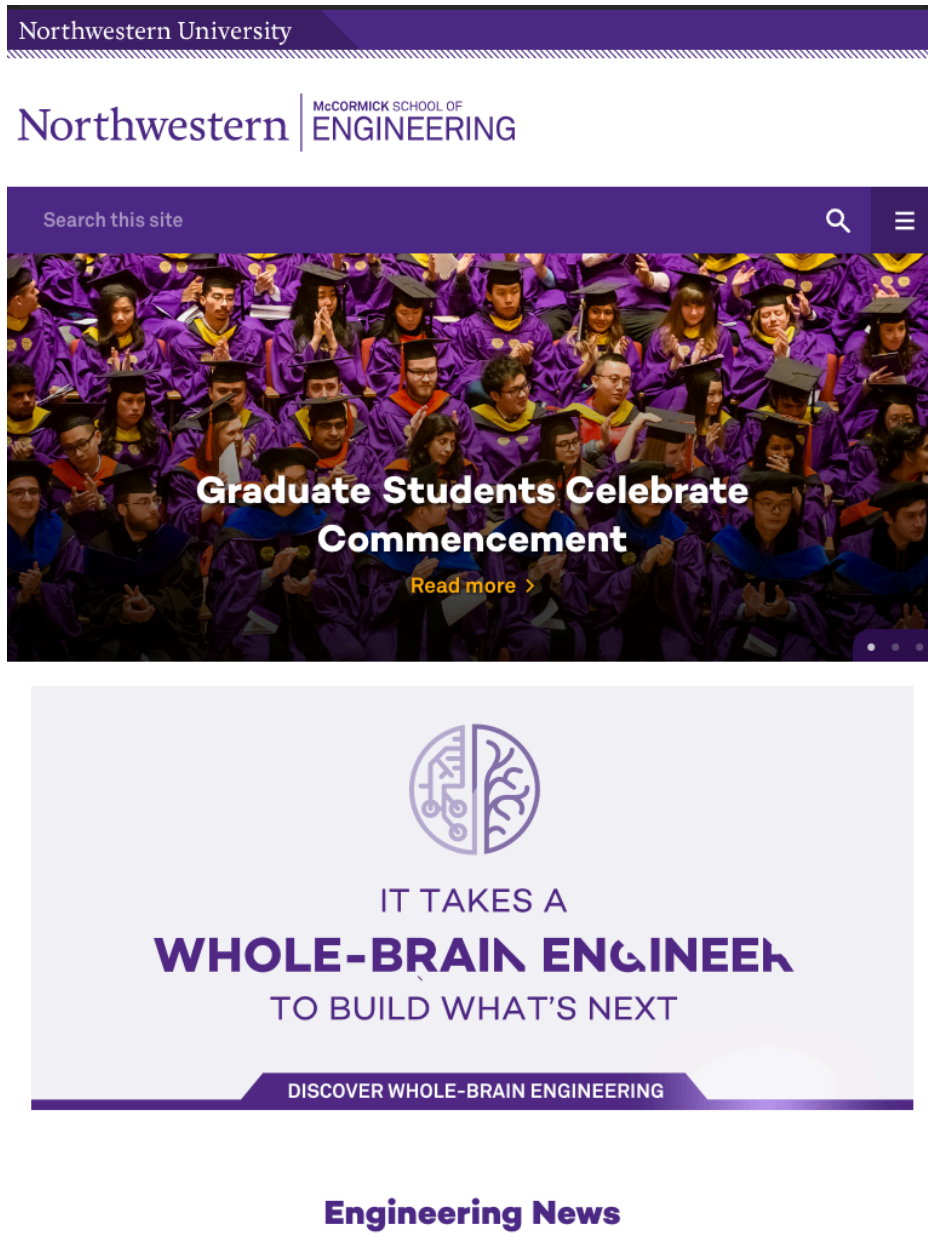


5

Right Sidebar
Callout Box
(Optional &
not shown on
this page.
See...)



Tablet Size



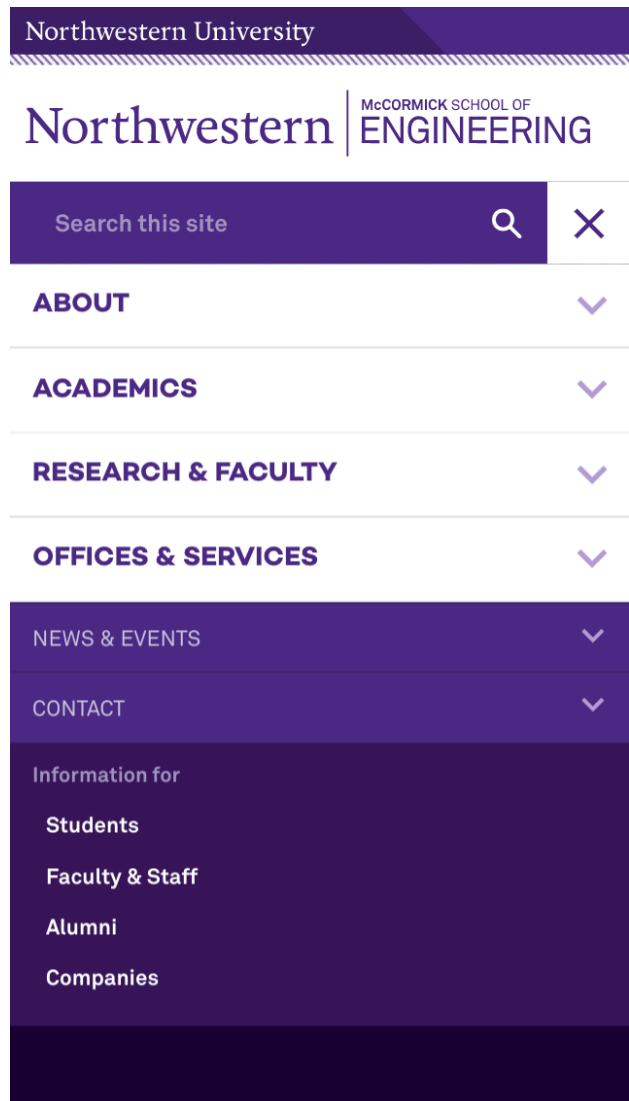
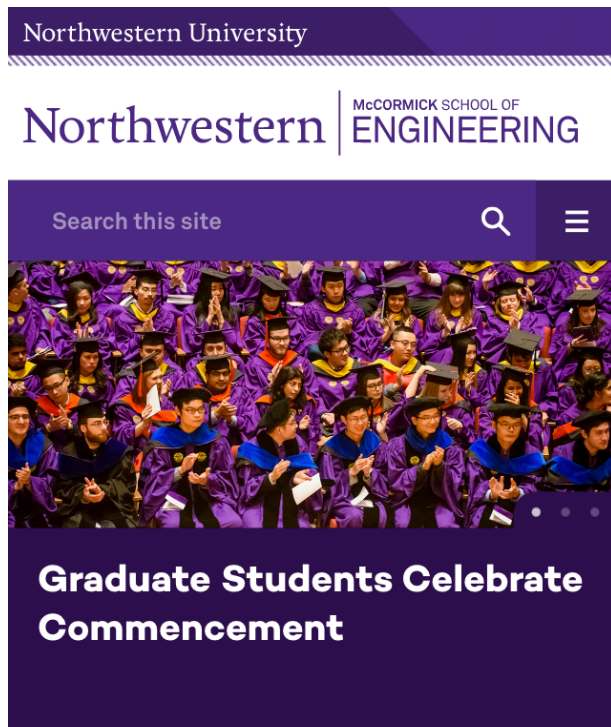
At tablet size, the Super and Top Navigation are combined and displayed as a hamburger menu

Captions are hid in the slider and can be changed using dots in bottom right corner

Mobile Phone Size

At mobile size, the feature slideshow shows only the image, no title or captions. And the site's navigation is accessed via a hamburger menu bar.

The main site navigation can be expanded by clicking the white hamburger menu bar icon at the screen's top right next to the search bar.



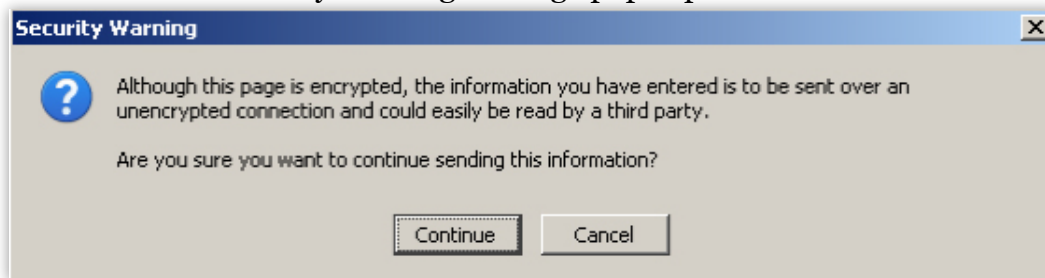
Module 1: Cascade Basics I – Getting Familiar

Logging in to Cascade

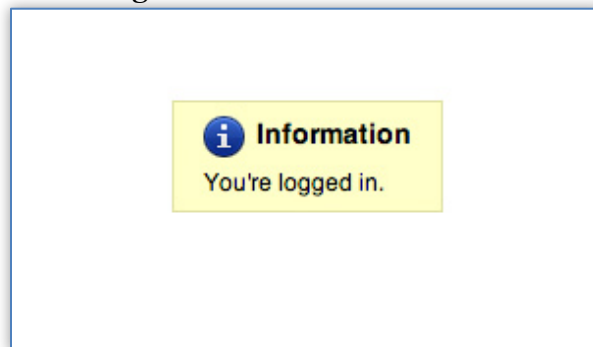
Open a browser and enter the following URL (or click this link): <http://wcms.northwestern.edu/>

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://wcms.northwestern.edu/>) and your browser will automatically redirect you to the Home Screen, so you can begin working in Cascade.

Best Practice:

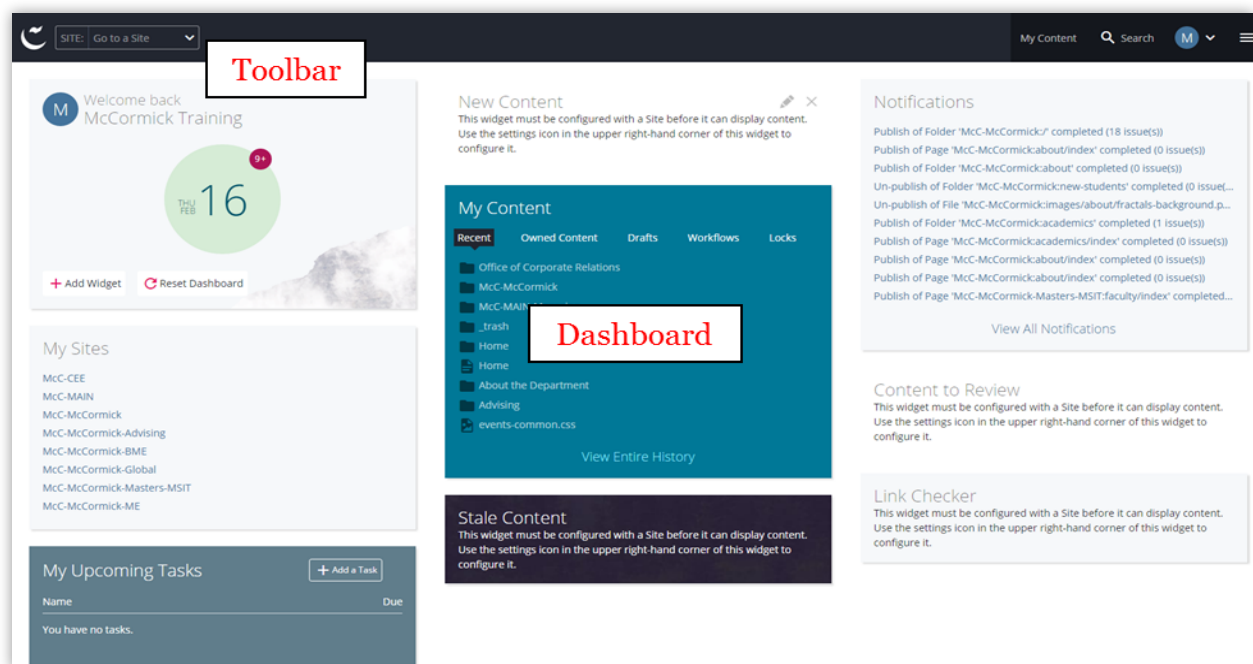
McCormick IT recommends Cascade users work in Chrome or Firefox. Internet Explorer also works, but Chrome and Firefox generally perform better.

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 Home Screen

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 two main areas:

- The **toolbar**, which runs across the top of the screen, allows you to perform some actions, such as returning to the home screen and navigating to a specific website.
- The **dashboard / main panel**, which takes up the majority of the screen, changes according to the task you are performing. It offers a view of helpful site widgets that users can add, remove or move.

The Toolbar

The Cascade's toolbar in the Home Screen has been simplified to contain several functions.

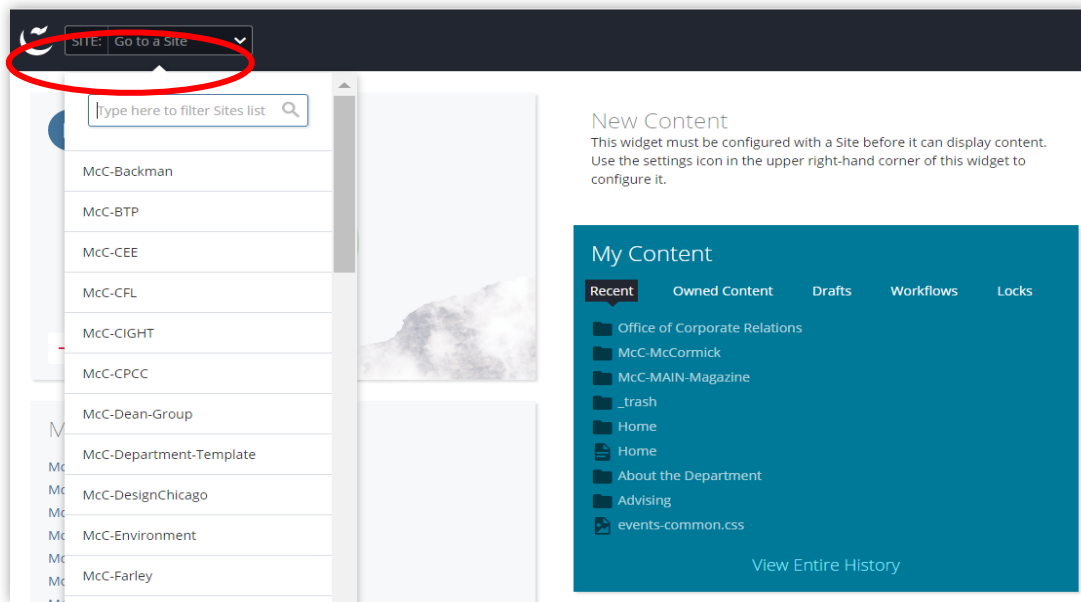
Some toolbar items are simply buttons; others are drop-down menus (indicated by a double downward arrow ▼).

The functions available in the Toolbar are similar to those found on the Dashboard, but are consistently available.



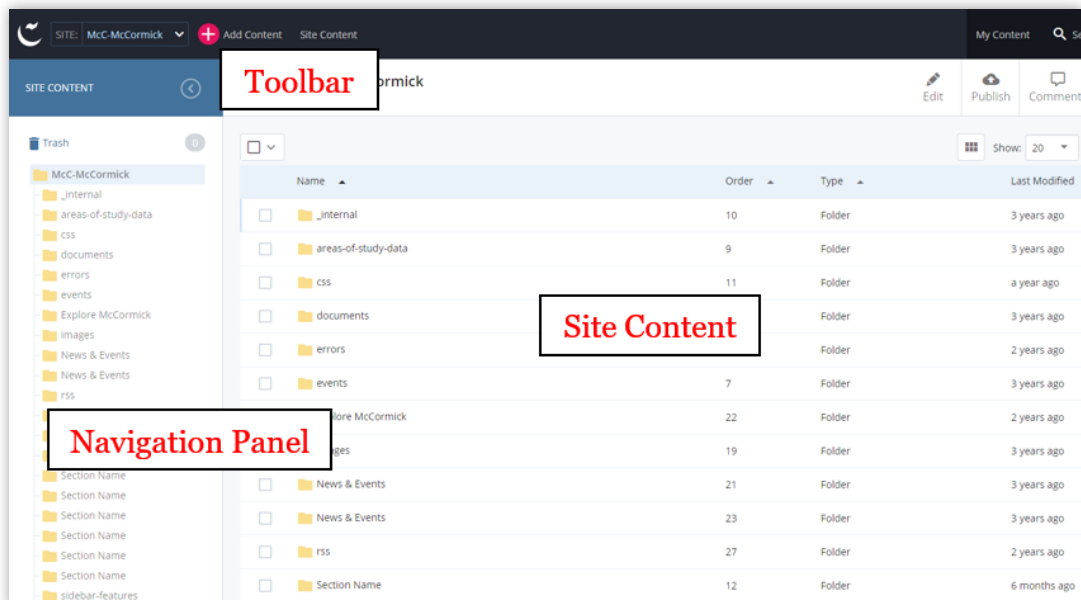
- The **Cascade Crescent** menu leads you to the Home Screen dashboard, with user-defined widgets.
- The **Sites** menu gives you a drop-down list that displays the accessible websites, and also a search bar to filter the sites list
- The **My Content** button is used to show you content-related lists of recently viewed assets, content ownership, drafts, assigned tasks and more. This button appears in the Help menu at smaller screen sizes.
- The **Search** menu provides a function to search for website assets and a shortcut to a list of most recently viewed assets in the My Content section.
- The **Help** menu allows you to get in-system help such as reports and get to the Cascade knowledge base for more technical information.

The Sites Menu




You'll notice a drop-down menu at the upper left of the Home Screen that says "SITE: Go to a Site" by default. Clicking the down arrow on the menu tab reveals the sites you have access to view and edit in Cascade. Also, you can type keywords to filter the site list.

Once you choose a website, then you are redirected to the Site Content page as below.

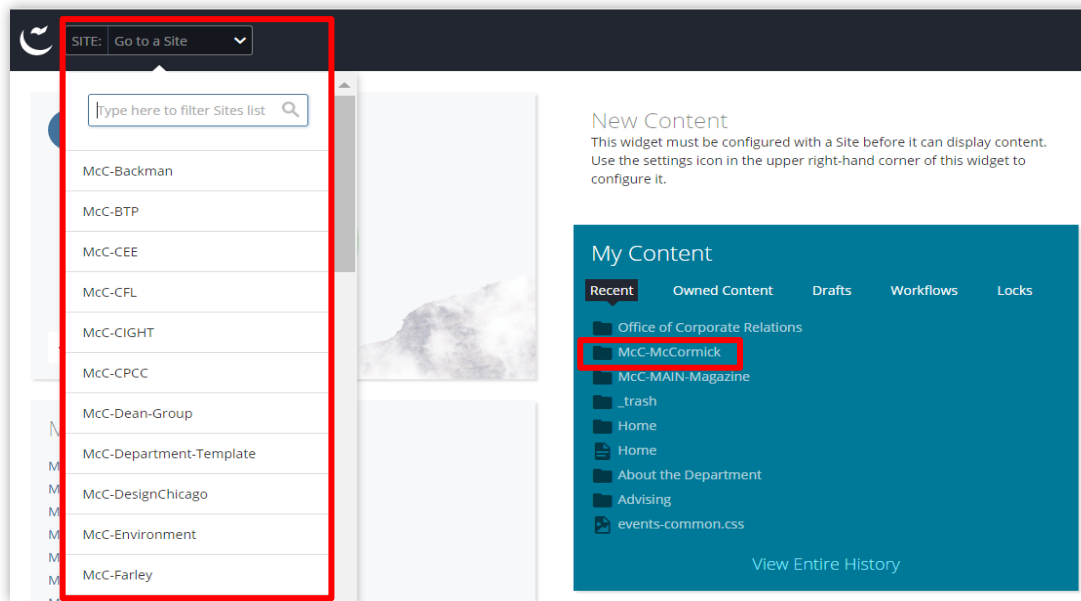


- Unlike the one in the Home Screen, the **Toolbar** menu on the Site Content page allows you to add website content through the **Add Content** button.

- The **Navigation Panel** window permits you to navigate the website content. You can hide this panel at any time by clicking the arrow icon .
- The **Site Content** window displays content details and previews.

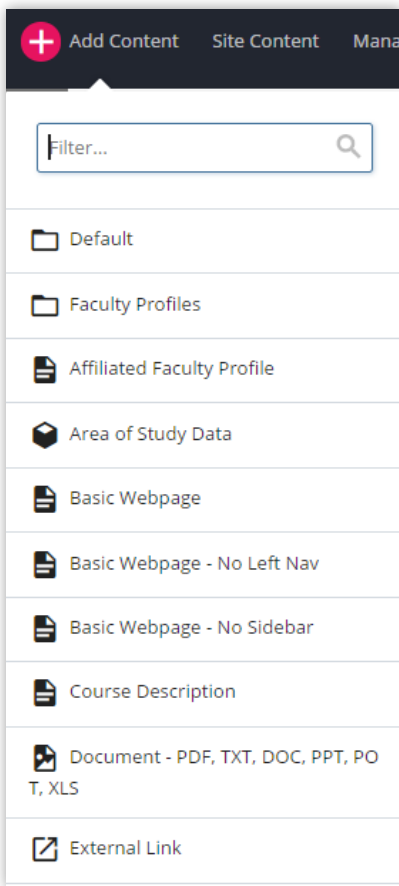
The Add Content Button

The Add Content button is available when you browse to a certain site mainly through “SITE: Go to a Site” drop-down menu, or a recent history link in “My Content >> Recent” Widget. In the drop-down menu, you can either search for the site you’d like to navigate to, or simply click it. In the My Content >> Recent Widget, you can click a link to the site.



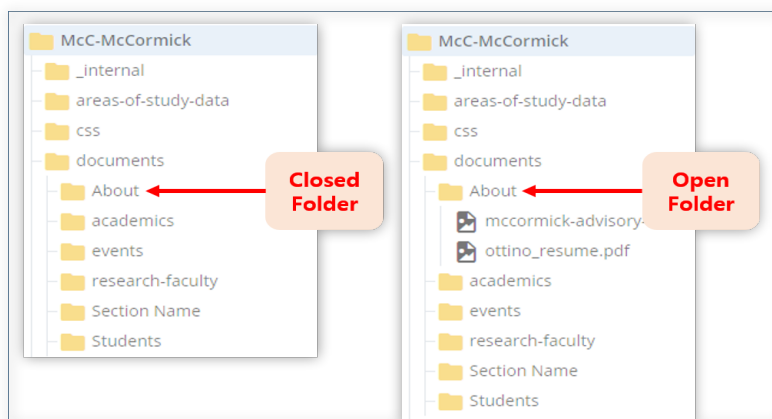
If you click the Add Content button, a drop-down menu will appear. You can either search for the name of an asset you’d like to create in the search bar, or select an asset from the list.

There is a shortcut for creating a new asset in the New Content Widget of the Dashboard. See [New Content Widget](#) section of this document for further instructions.



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 each folder to view its contents. Clicking the folder expands or contracts that folder’s contents, as shown below.

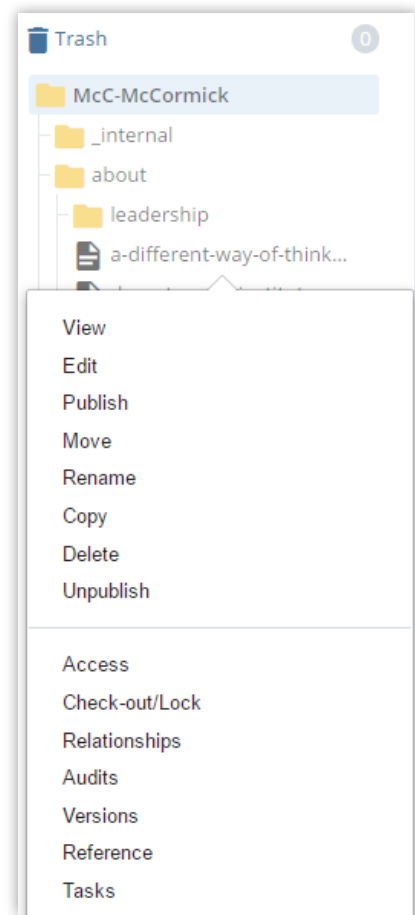


To begin browsing the site in Cascade, click on a folder in the navigation panel to expand the folder tree. Once the folder expands, the sub-folders and page assets are displayed in the same directory structure that exists when published. Choosing a page in

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

The Contextual Menu

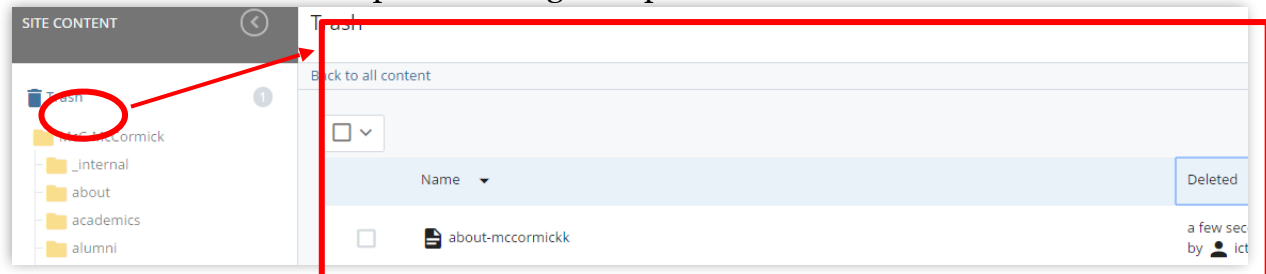
When you right-click on an asset, the contextual menu is displayed for that asset. The contextual menu is a shortcut that allows you to quickly jump into editing and other functions available in the content page Toolbar, without waiting for the page preview to be loaded in the Site Content window first.



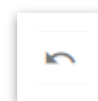
The Trash Bin

The Trash Bin contains assets you and other site users have recently deleted. These assets are kept in case of accidental deletion. Note that assets in the Trash Bin are deleted permanently after 15 days.

Access the trash bin on top of the navigation panel.



To restore an asset to its original location, select the asset and click the leftward curve icon on top of the Trash list.



The Dashboard

My Sites Widget

If you have access to more than one site in Cascade, you will see a list of **recently** visited sites under the **My Sites** widget. This allows you to quickly navigate to the site(s).

The screenshot displays the Cascade CMS dashboard interface. At the top, there is a navigation bar with a 'SITE: Go to a Site' dropdown, 'My Content', a search icon, and a user profile icon labeled 'M'. The dashboard is divided into several widgets:

- Welcome back McCormick Training:** A circular widget showing the date 'THU FEB 16' and a '9+' notification badge. It includes '+ Add Widget' and 'Reset Dashboard' buttons.
- New Content:** A message stating 'This widget must be configured with a Site before it can display content. Use the settings icon in the upper right-hand corner of this widget to configure it.'
- My Content:** A widget with tabs for 'Recent', 'Owned Content', 'Drafts', 'Workflows', and 'Locks'. It lists various content items like 'Office of Corporate Relations', 'McC-McCormick', 'McC-MAIL', '_trash', 'Home', 'About the Department', 'Advising', and 'events-common.css'. A 'View Entire History' link is at the bottom.
- Notifications:** A list of recent actions, including 'Publish of Folder 'McC-McCormick/' completed (18 issue(s))', 'Publish of Page 'McC-McCormick:about/index' completed (0 issue(s))', 'Un-publish of Folder 'McC-McCormick:new-students' completed (0 issue(s))', 'Un-publish of File 'McC-McCormick:images/about/fractals-background.p...', 'Publish of Folder 'McC-McCormick:academics' completed (1 issue(s))', 'Publish of Page 'McC-McCormick:academics/index' completed (0 issue(s))', 'Publish of Page 'McC-McCormick:about/index' completed (0 issue(s))', 'Publish of Page 'McC-McCormick:about/index' completed (0 issue(s))', and 'Publish of Page 'McC-McCormick-Masters-MSIT:faculty/index' completed...'. A 'View All Notifications' link is at the bottom.
- Content to Review:** A message stating 'This widget must be configured with a Site before it can display content. Use the settings icon in the upper right-hand corner of this widget to configure it.'
- Link Checker:** A message stating 'This widget must be configured with a Site before it can display content. Use the settings icon in the upper right-hand corner of this widget to configure it.'
- My Upcoming Tasks:** A widget with a '+ Add a Task' button and a table with columns 'Name' and 'Due'. It currently shows 'You have no tasks.'
- My Sites:** A widget with a red border, listing several sites: 'McC-CEE', 'McC-MAIN', 'McC-McCormick', 'McC-McCormick-Advising', 'McC-McCormick-BME', 'McC-McCormick-Global', 'McC-McCormick-Masters-MSIT', and 'McC-McCormick-ME'.
- Stale Content:** A message stating 'This widget must be configured with a Site before it can display content. Use the settings icon in the upper right-hand corner of this widget to configure it.'




My Upcoming Tasks Widget

This is a new feature in Cascade 8. You can also create a task by clicking **Add a Task** button. When you click add a task button, a pop-up window appears where you can enter a **Name** for the task, a **Description**, **Assigned User** (by default it's assigned to the person creating the task), set a **Priority**, enter a **Due Date** and list any **Related Content** (for example –a file or image, or a webpage)

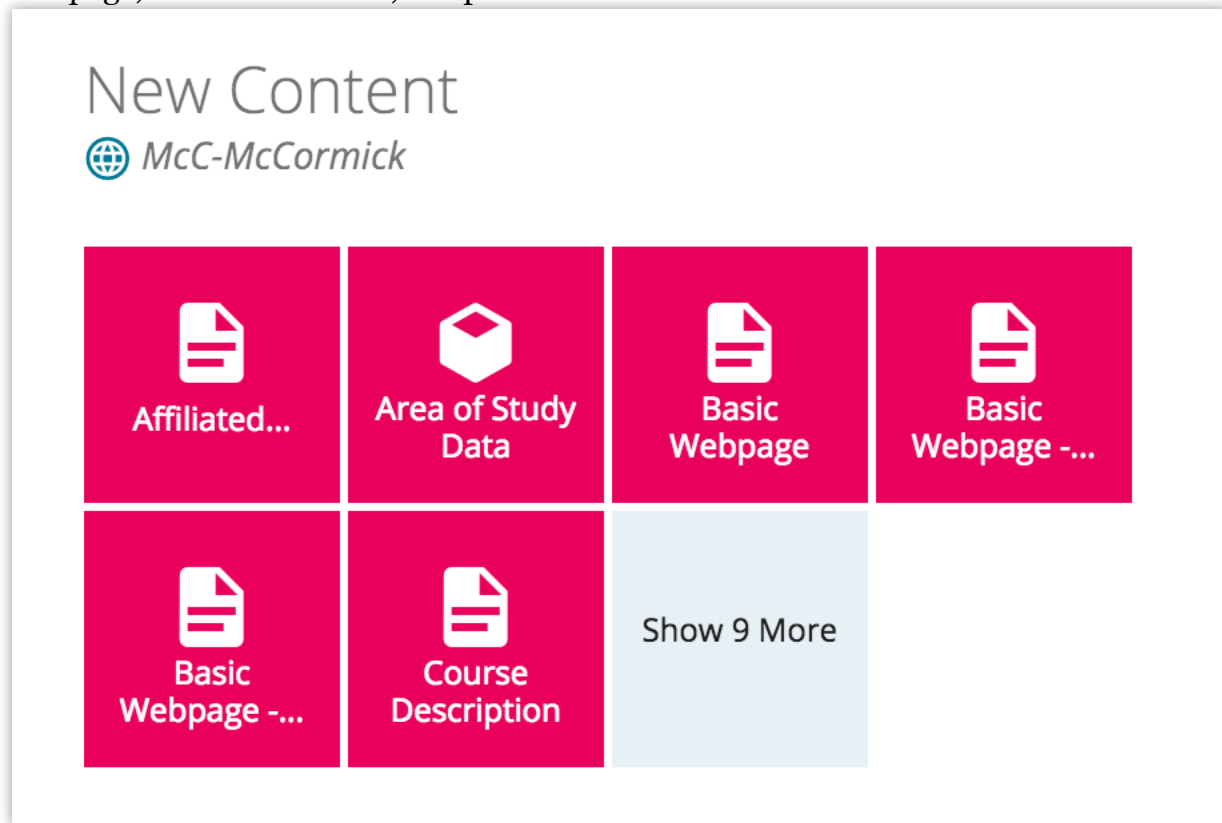
The image shows two parts of the user interface. The top part is a widget titled "My Upcoming Tasks" with a dark blue header. It contains a table with columns "Name" and "Due". Below the table, it says "You have no tasks." A red box highlights a "+ Add a Task" button in the top right corner of the widget. A red arrow points from this button to the bottom part of the image, which is a "Create a Task" modal. The modal has a title bar with "Create a Task", "Cancel", and "Create" buttons. The form inside the modal includes: a "Name" field with a red asterisk and a red error message "This field is required."; a "Description" text area; an "Assigned User" dropdown menu showing "User Assignment"; a "Priority" dropdown menu showing "Normal"; a "Due Date" field with a placeholder "mm-dd-yyyy hh:mm a"; and a "Related Content" section with a "Choose Site Content" button.

New Content Widget

This widget provides a shortcut to create new content on your site. All available asset types are listed. If you're logging in for the first time, to see available assets, click the pencil icon [that appears in the top right corner when you hover over the widget](#) to configure it for a website you have access to.

 New Content  
This widget must be configured with a Site before it can display content. Use the settings icon in the upper right-hand corner of this widget to configure it.

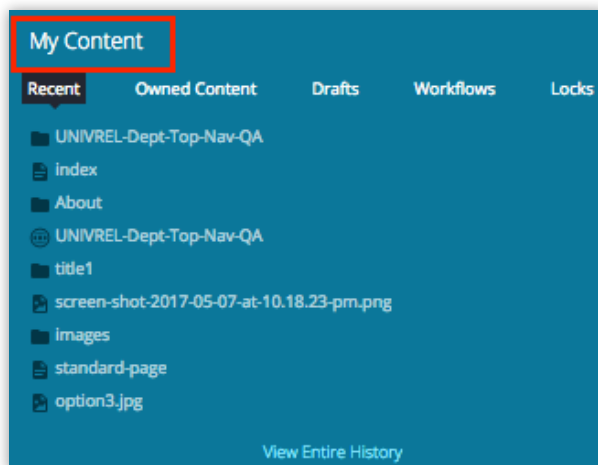
Select the appropriate asset type from the icon list when you need to create a new webpage, or create a folder, or upload a new file.



My Content Widget

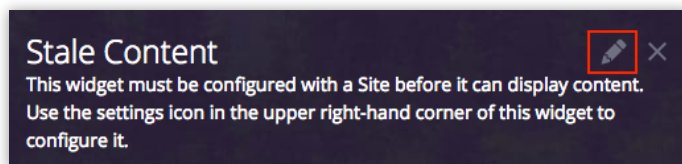
You'll find a list of recently clicked assets under **Recent**, saved drafts under **Drafts** and assets that you've checked out to yourself under **Locks**. Most of our sites don't have Workflows. Just switch to the appropriate subtab to see the relevant content.

By default, Recent is displayed in the My Content section at the center of the Dashboard. There are other ways to get access to Recent.

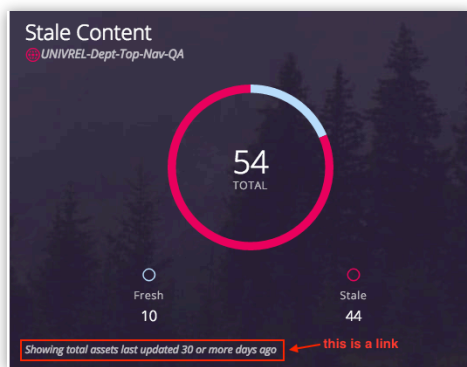


Stale Content Widget

Stale content widget shows you when the site content was last updated. If you're logging in for the first time, click the pencil icon in the top right corner to select your site and set the time period to determine content staleness.



After you've configured it, you will see a chart showing the number of stale vs fresh assets. You click on the link Showing total assets last updated 30 or more days ago to see a full list.



If you expand **Filter Results** option, you'll see the options to change the number of days and include the folder you need to routinely update. In this way, you can exclude sections that don't get updated often.

Notification Widget

The **Notifications** widget lists messages related to publishing and un-publishing of an asset. Any errors or issues with your publishing jobs will be logged here.

The screenshot shows the Cascade CMS dashboard. At the top, there's a header with a 'SITE: Go to a Site' dropdown. Below the header, the dashboard is divided into several sections. On the left, there's a 'Welcome back' section with a date '23 JUN' and buttons for '+ Add Widget' and 'Reset Dashboard'. Below that is 'My Sites' listing 'McC-McCormick', 'McC-NU-Template', 'McC-SegalDesign', and 'WCMS-Commons'. Further down is 'My Upcoming Tasks' with a '+ Add a Task' button. At the bottom left is a 'Stale Content' widget with a message: 'This widget must be configured with a Site before it can display content. Use the settings icon in the upper right-hand corner of this widget to configure it.' In the center, there's a 'New Content' section with icons for 'Affiliated...', 'Area of Study Data', 'Basic Webpage', 'Basic Webpage...', and 'Basic Webpage...'. Below that is 'My Content' with tabs for 'Recent', 'Owned Content', 'Drafts', 'Workflows', and 'Locks'. On the right, there's a 'Report: Stale Content' section. The 'Notifications' widget is highlighted with a red box. It shows a list of messages: 'Publish of Page "/>

Reconfigure Dashboard

- You can drag and drop widgets to rearrange them on your dashboard.
- You can add/remove widgets by clicking on **Add Widget** button.

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
- an image file (photo)
- a folder
- a PDF
- an MS Word document
- an MS Excel document
- an external link
- an internal link

Naming Files, Folders, and Webpage Assets

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 **Asset Name** in Cascade, please follow these guidelines:

- Asset 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 Asset Names:

<u>GOOD</u>	<u>BAD</u>
catalysis-research-laboratory.jpg	CatReschlab.jpg
john-smith.jpg	John Smith Good Headshot1.jpg
john-smith-publications.pdf	Johnsmith_Pubs_9-12-11.pdf
smith-group-newsletter.pdf	SmithResearchgroupNewsletterApril2012.pdf
research-safety-guidelines.doc	Rsch Safety 2011 Guidelines.doc

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

Module 2: Editing a Basic Page

To edit a basic page, select that page from the left-hand navigation tree in the content page. 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:

The screenshot shows the editing interface for the 'About McCormick' page. At the top, there is a navigation bar with tabs for 'Content', 'Metadata', 'Configure', and 'Fullscreen'. To the right of these tabs are links for 'Draft saved', 'Close', and a blue 'Save & Preview' button. Below the navigation bar, the main editing area is divided into two sections. The first section contains form fields for 'Display Name' (with a red asterisk), 'Title' (with a red asterisk), 'Keywords', 'Description', and a 'Display Page in Left Navigation?' dropdown menu. The second section, titled 'Basic Page', contains a 'Main Content' section with a 'Header Image(s)/Slider' section. Below this is a radio button selection for 'Include jump menu?' (with a red asterisk), set to 'Yes'. Below that is a 'Jump Menu' section. At the bottom, there is a 'Body Content' section with a toolbar containing various editing tools like bold, italic, underline, list, link, and image, along with a 'Formats' dropdown menu.

Content Metadata Configure Fullscreen Draft saved Close Save & Preview

Display Name *
About

Title *
About McCormick

Keywords
whole-brain engineering, design thinl

Description
Learn about the McCormick School o

Display Page in Left Navigation?
No

Basic Page

▼ Main Content

▼ Header Image(s)/Slider

Include jump menu? *
☒ Yes ☐ No

▼ Jump Menu

Body Content || Images = portrait (width 150px); landscape (width 250px); full-size (width 670px)

Edit ▼ Format ▼ Insert ▼ Table ▼ View ▼ Tools ▼

↶ ↷ B I U Formats ▼

Page Location/URL

At the top of the site content window, you'll notice

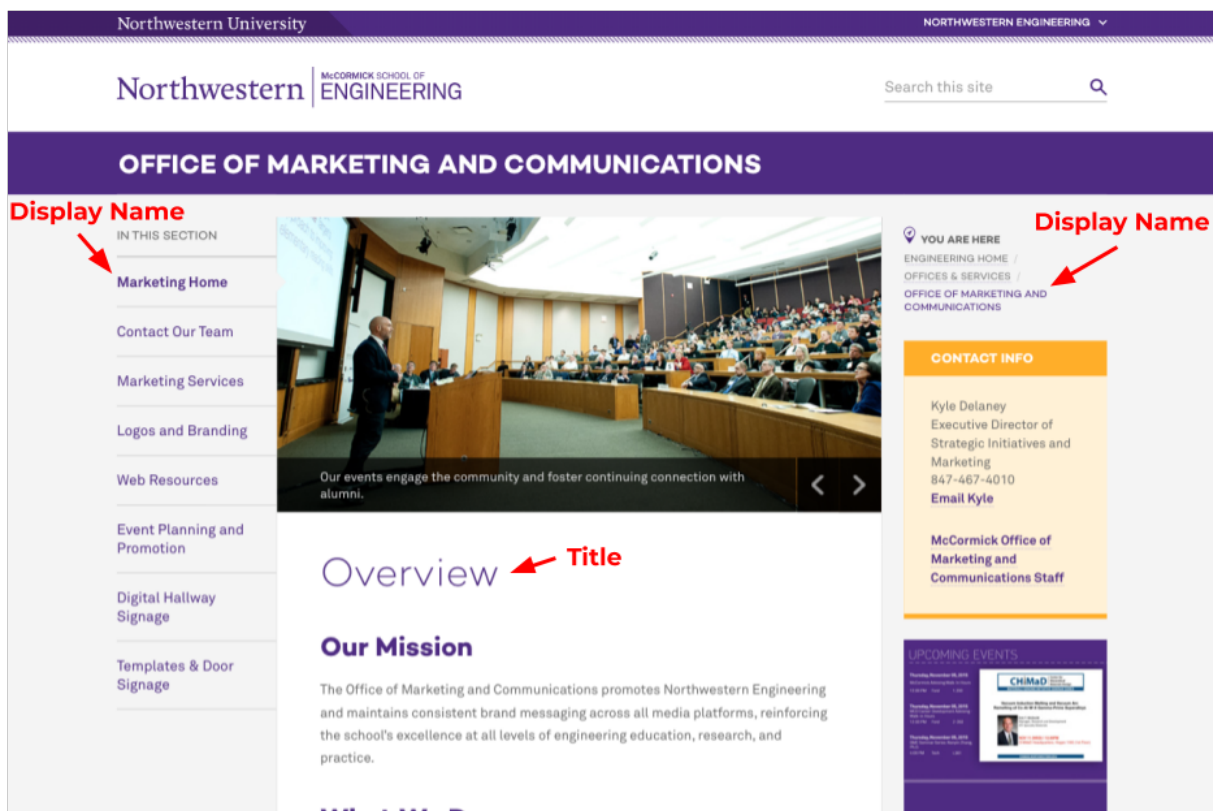
the indication of the page's location in a path directory format: **about/index**.

This indicates that the page has an Asset 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.



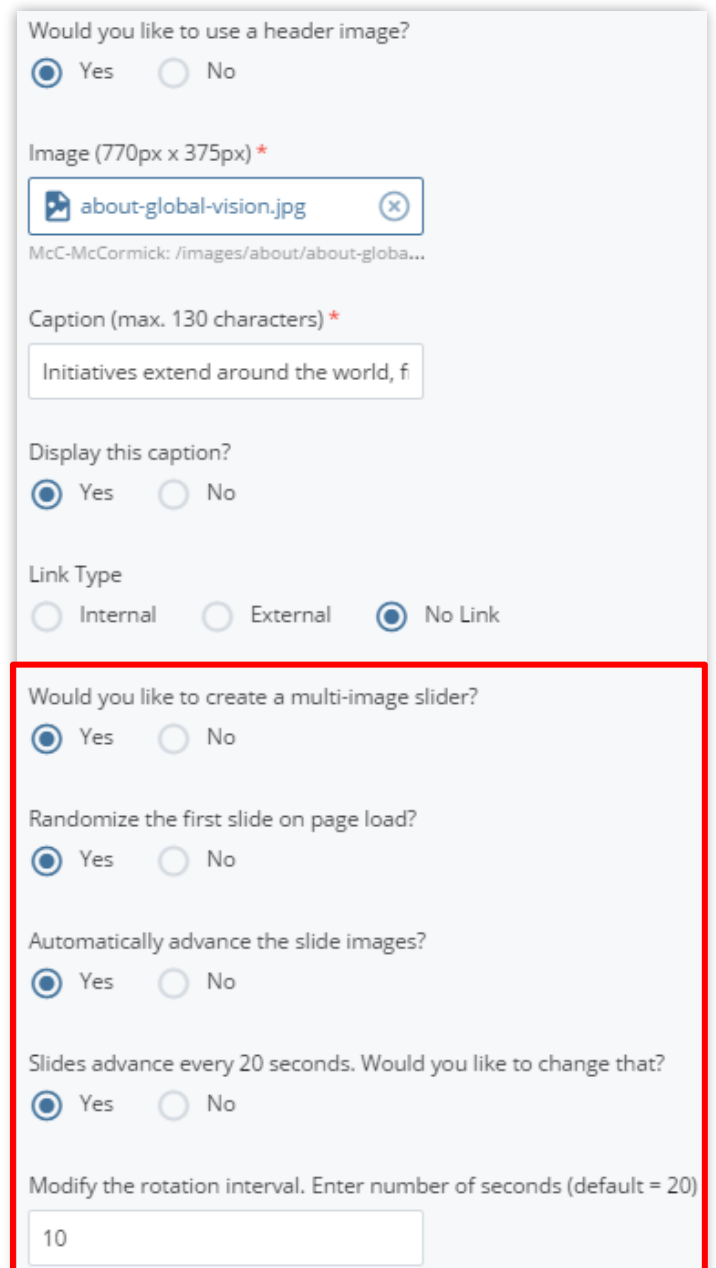
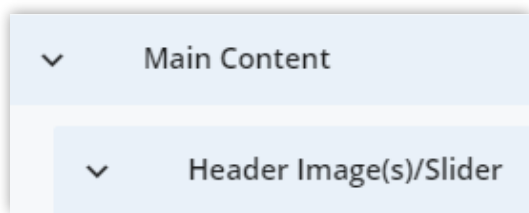
Learn more on how to fill out this section in the "[Include Metadata](#)" subsection of this guide.

Header Image/Slider

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

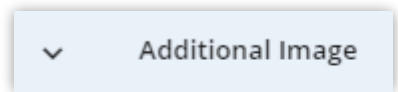
As you answer the series of "Yes/No" questions about your image(s)/slideshow, options will appear to further indicate specifications such as:

- 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

A screenshot of a configuration form for a header image or slider. The form is divided into two sections. The top section, titled 'Would you like to use a header image?', has radio buttons for 'Yes' (selected) and 'No'. Below this, there is a field for 'Image (770px x 375px) *' with a file selection button and a text input showing 'about-global-vision.jpg'. A small text below the input reads 'McC-McCormick: /images/about/about-globa...'. There is also a 'Caption (max. 130 characters) *' field with the text 'Initiatives extend around the world, f'. Below the caption field is a 'Display this caption?' section with radio buttons for 'Yes' (selected) and 'No'. The 'Link Type' section has radio buttons for 'Internal', 'External', and 'No Link' (selected). The bottom section, titled 'Would you like to create a multi-image slider?', has radio buttons for 'Yes' (selected) and 'No'. Below this are three more questions: 'Randomize the first slide on page load?' with 'Yes' (selected) and 'No' radio buttons; 'Automatically advance the slide images?' with 'Yes' (selected) and 'No' radio buttons; and 'Slides advance every 20 seconds. Would you like to change that?' with 'Yes' (selected) and 'No' radio buttons. At the bottom, there is a field 'Modify the rotation interval. Enter number of seconds (default = 20)' with the value '10' entered. The entire bottom section is highlighted with a red border.

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:

Click the downward arrow v to expand this section and edit the fields for the slides. Add more slides by clicking the green plus sign + at the top right 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.

The screenshot shows a web page for the McCormick School of Engineering. The main heading is "ABOUT McCORMICK". Below it is a paragraph of text. A "Jump Menu" is located below the text, titled "Jump to a Section". The menu lists several sections: "Whole-Brain Engineering", "Design", "Entrepreneurship and Innovation", "Leadership", "Global Vision", "Collaboration and Balance", and "Facts and Figures". Below the menu is a section titled "WHOLE-BRAIN ENGINEERING™".

Annotations on the screenshot:

- Title**: Points to the "ABOUT McCORMICK" heading.
- Preface Content**: Points to the paragraph of text below the heading.
- 1st Anchor Link**: Points to the "Whole-Brain Engineering" link in the Jump Menu.
- Jump Menu**: Points to the entire "Jump to a Section" menu.
- 1st Anchor**: Points to the "WHOLE-BRAIN ENGINEERING™" section heading.

To use this menu, select "Yes" for "Include jump menu?" Click the "v Jump Menu" box that appears. You'll first notice an area for optional Preface Content, which would

appear above the jump menu on the page. Use this area for an introductory message to your page 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** used 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.

Include jump menu? *

☒ Yes

☐ No

Jump Menu

Preface Content (optional)

EditFormatInsertTableViewTools

B

I

U

Formats

Page Anchor

Text *

Anchor Name *

anchor

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.

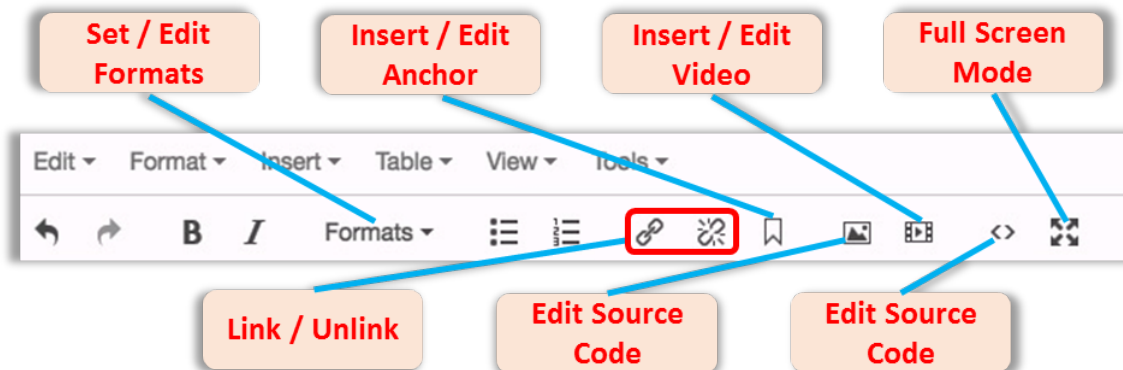
Many of the options on the Cascade editor toolbar (especially the ones on the left side) will be familiar to users of common word processing software. You can perform many of the same actions to format text as you can in a program like Microsoft Word.

Important!

Use only Cascade's built-in formatting tools!

McCormick IT has configured Cascade's text formatting to ensure that web pages are **uniform** and **consistent** throughout McCormick websites.

As such, editors should refrain from making adjustments to the HTML code that would do things like changing the font size, color, or typeface.



There are six drop-down menus in the toolbar as follows:

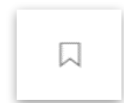
- **Edit** menu allows you to edit content through undo, redo, cut, copy, paste, paste as text, and select all functions.
- **Format** menu enables you to set the format of content to bold, italic underline, strikethrough, superscript, subscript, and to clear the formatting. You can also access the Formats menu.
- **Insert** menu contains functions to include links, anchors, images, media, special characters, horizontal lines, and data/time.

- **Table** menu allows you to insert and edit tables. It is advised to **not use tables on the site**. If you have information that absolutely needs a tabular display, please contact marketing at web-updates@mccormick.northwestern.edu.
- **View / Tools** menus provide functionality to help users in terms of view, spellcheck, and source code.

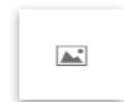
Also, there are some shortcut tools – noted in the graphic above – that may require some additional explanation with regards to how they function.



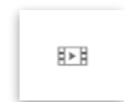
Link/Unlink: These tools will allow you to create/edit hyperlinks out of any text or image within your body content.



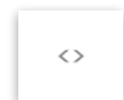
Insert/Edit Anchor: Anchors allow you to mark points anywhere on your web page so that they can be easily accessible by users. They are most often used on web pages with a large amount of content, as they offer the ability to go directly to a single piece of content rather than scrolling down through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



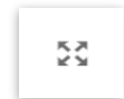
Insert/Edit Image: Select this icon to insert an image into your page. Please read the “Inserting Images” section of this manual for important information on this process [page **00**].



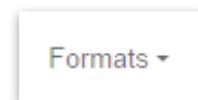
Insert/Edit Video: Select this icon to insert a video into your page. Please read the “Inserting Videos” section of this manual for important information on this process [page **00**].






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.



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.



Set / Edit Formats: Clicking this drop-down menu will provide a shortcut to set or edit headings, inline, blocks, alignment, and custom classes.

NOTE: You will notice buttons in the editor toolbar to “underline,”  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, underline, 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.

NOTE: Cascade is currently configured to remove the “centered” formatting available in the WYSIWYG editor. If you want to center-align any text, use the “Formats” drop-down menu as explained earlier.

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 “Formats” drop-down menu and then “Headings” menu. Finally, select “Heading 2” or “Heading 3.”

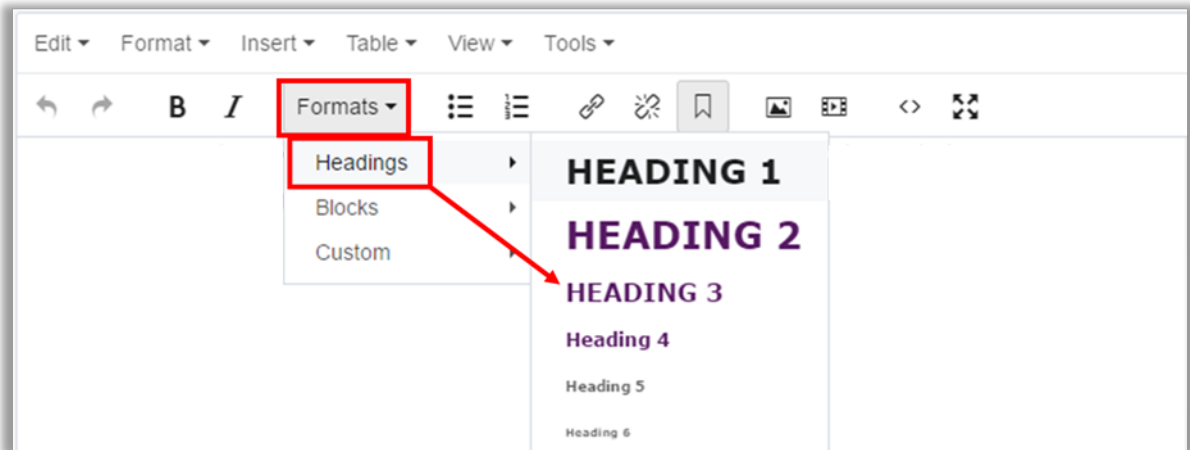
The importance of a heading descends as its number ascends, so information used as a Heading 2 should be more important than that of a Heading 3.

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 “Optimizing Your Content”.**



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 Text”** located in the Edit drop-down menu in the toolbar. With that button selected, text you paste into Cascade will automatically be stripped of any hidden formatting.

Important!

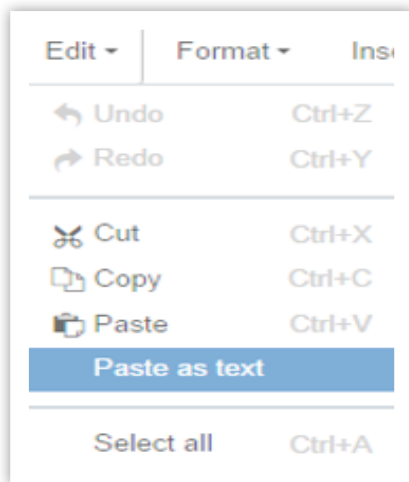
Clicking the “Cut,” “Copy,” or “Paste” buttons in the Cascade editor don’t work.

Use keyboard hotkeys instead:

Cut: “Control + X” (for PC) or “Command + X” (for Mac)

Copy: “Control + C” (for PC) or “Command + C” (for Mac)

Paste: “Control + V,” (for PC) or “Command + V” (for Mac).



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.

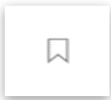


From there, you will need to specify the following:

- 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

 A screenshot of the 'Insert/edit link' dialog box. It has a title bar with a close button. The 'Link Source' section has radio buttons for 'Internal' (selected) and 'External'. The 'Link' field has a button that says 'Choose File, Page, or Link'. Below are input fields for 'Anchor', 'Text to display', and 'Title'. There are dropdown menus for 'Target' (set to 'None') and 'Class' (set to 'None'). At the bottom right are 'Ok' and 'Cancel' buttons.

NOTE: External links that go to webpages that are 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

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.

Important!

1. Anchor names should be treated as Asset Names:

Use lowercase keywords separated by hyphens. Do not use spaces or special characters in your anchors.

2. Keep close track of your anchor link names!

Cascade’s system for linking to anchors in a page does not provide a list of anchors to choose from — you have to enter the anchor name yourself. If the anchor name you enter isn’t exactly right, the link won’t work!



3. Always test your anchor links after publishing them.

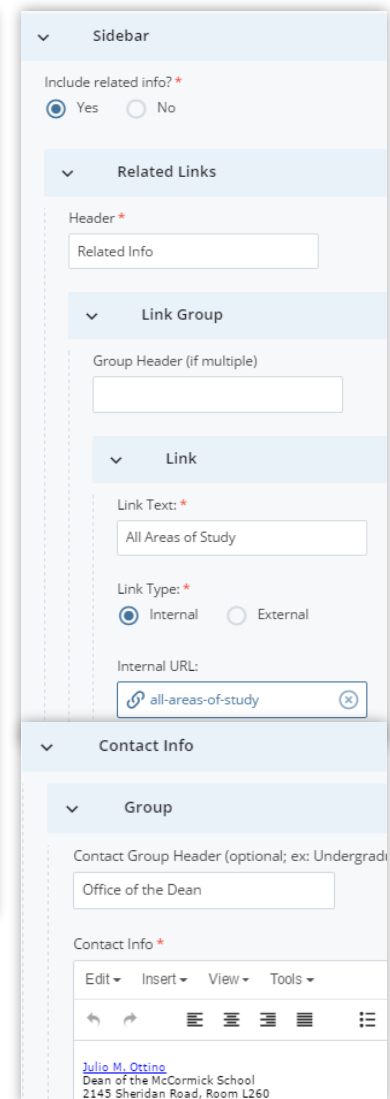
If you find problems, it’ll be much easier to correct them immediately than it would be hours or days later.

2. Enter an anchor id (name) and click “Ok.” **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.

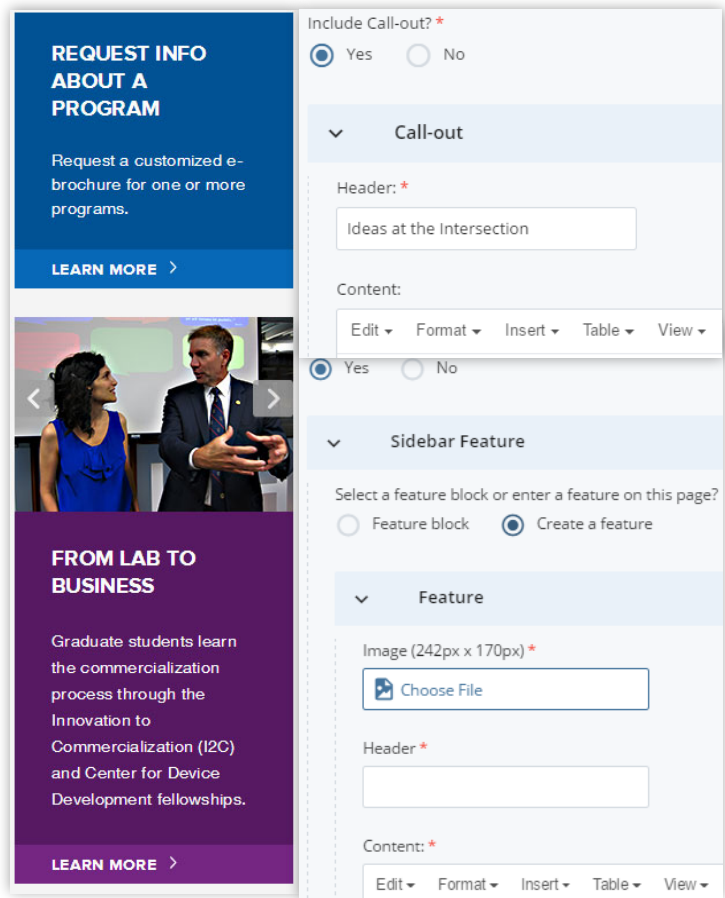
Sidebar Options

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

- Related Links (optional)
 - Select “Yes” for “Include related info?” then click “v Related Links”. Enter content for links. Click the green plus icons  to add another group/individual links.
- Contact Info (required)
 - Enter contact information. Click the green plus 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 "v 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 bloc for more than one page. Sidebar feature blocks are stored in the "sidebar-features" folder and each will have a block icon



REQUEST INFO ABOUT A PROGRAM

Request a customized e-brochure for one or more programs.

[LEARN MORE >](#)

FROM LAB TO BUSINESS

Graduate students learn the commercialization process through the Innovation to Commercialization (I2C) and Center for Device Development fellowships.

[LEARN MORE >](#)

Include Call-out? *

☒ Yes ☐ No

Call-out

Header: *

Ideas at the Intersection

Content:

Edit Format Insert Table View

☒ Yes ☐ No

Sidebar Feature

Select a feature block or enter a feature on this page?

☐ Feature block ☒ Create a feature

Feature

Image (242px x 170px) *

[Choose File](#)

Header *

Content: *

Edit Format Insert Table View

To create a new general sidebar feature:

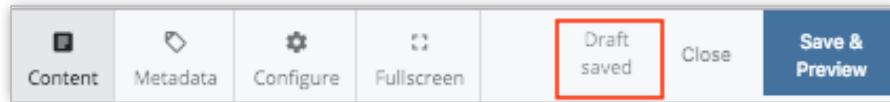
1. Go to "Add Content→Sidebar Feature" and give your general feature a descriptive Asset Name.
2. Fill in the appropriate fields for your slide(s) and submit.
3. Publish **any image assets** added to the block separately. Unfortunately, the images won't appear in the sidebar slideshows if you have not 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.



To save a page as a draft, click the “**Save & Preview**” button at the top right of the Edit window. This allows you to view your draft after saving it.

Drafts are useful when you’re working on a page but need to stop and focus on something else for a while. If you go back in **Edit** mode, you’ll see a yellow bar with three options:

A draft of this page was saved 7 minutes ago. Do you want to [preview the changes](#), [resume editing](#) or [discard it](#)?

- Preview the changes** – If you click here, you see a preview of your draft. You can also see a preview of the last saved version from here.
- Resume editing** – allows you to edit your draft.
- Discard it** – if you click here, your draft will be discarded

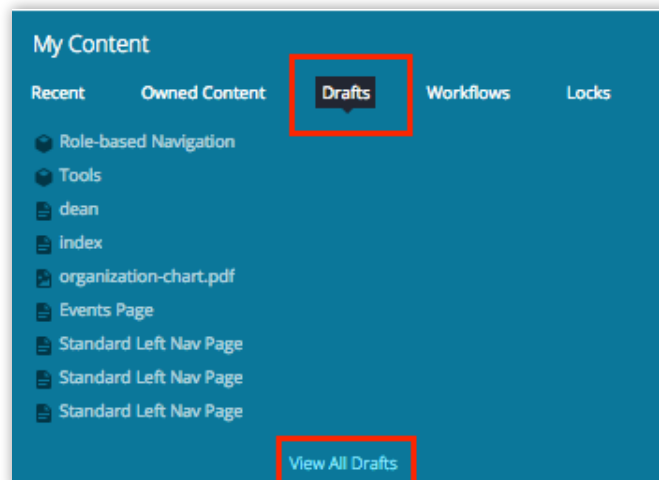
Important:

You are the only person who can see your draft of a page.

If you’ve made changes to a page but saved it as a draft (instead of clicking “Submit”), **other users will not be able to see your changes when they open the page.**

If you need another user to see your changes, go ahead and click “Submit” — it’s easy to roll back changes in Cascade, if needed.

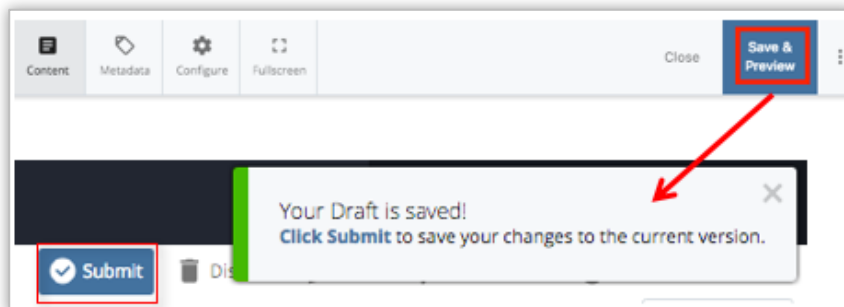
You can find all saved drafts under the **My Content** widget on



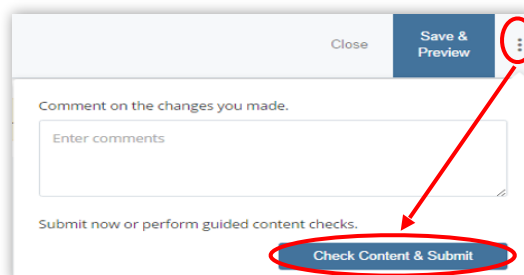
your Dashboard.

Save & Preview Vs. Submit

In Cascade 8, **Save & Preview** is the default option to save a draft and preview your edits. **Save & Preview does not submit your work!** After clicking Save & Preview the asset will reload with your edits, and a message will appear in the top right corner of the editing pane. This temporary message confirms that a draft has been saved and prompts you to **Submit** your work before fading away. You can select the “Click Submit” link text in the message before it disappears or the blue Submit button at any point.



If you'd like to skip the Save & Preview option and submit your draft, you can click the three-dotted button at the top right corner of the editing window. A window will appear to “**Check Content & Submit**”. If you click the button Cascade performs guided content checks before submitting.



NOTE: After clicking the blue check mark ☒ after the guided Check Content & Submit process, you save your work in Cascade. You still need to publish it to the live site.

Submit Vs. Publish

Submitting a page or asset saves that version in Cascade and allows other users to view your changes. 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. **However, submitting does NOT put your pages or files on the web. You must publish them.**

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, un-publishing removes content from the web.

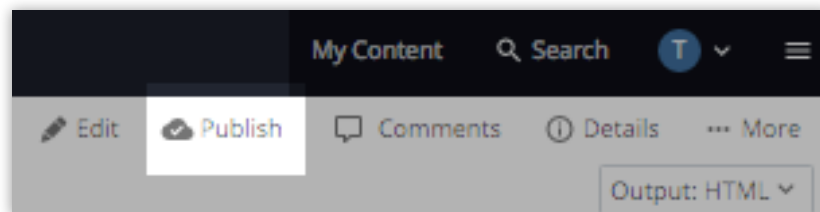
Publishing or Un-publishing Your Assets

Clicking “Submit” or “Check Content & Submit” at the top right 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.

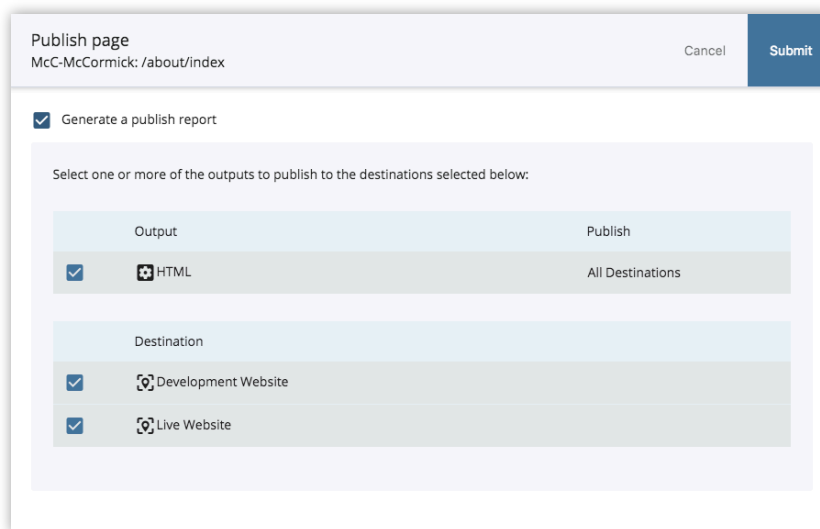
The publishing process is simple:

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 Asset Name and select “Publish.”



2. You’ll see two areas of the screen, where you’ll configure the publishing process for your pages:

be
the



•Output:
This area displays in what kind of outputs you’ll publishing your edits to servers.

- **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>.

- **“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.

Important:

When creating a new page, changing a page’s display name or removing a page, **you must publish the parent folder that contains that page/folder** to update the left-hand navigation throughout that area of your site.

“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.

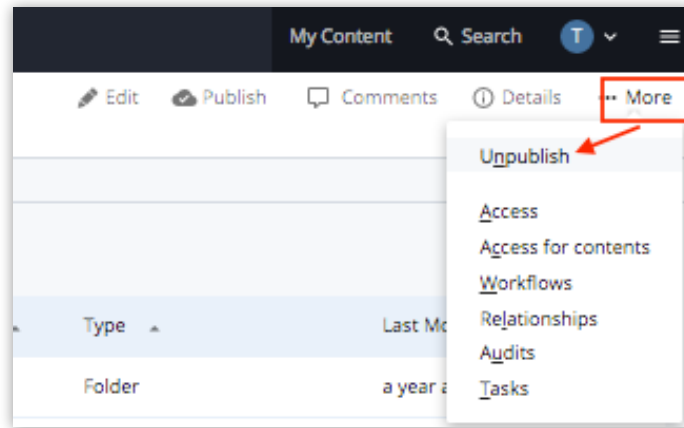
3. Once you’ve selected the configuration you want, click **“Submit”** to publish your page. You’ll get a confirmation message in a green bar at the top of the page.

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

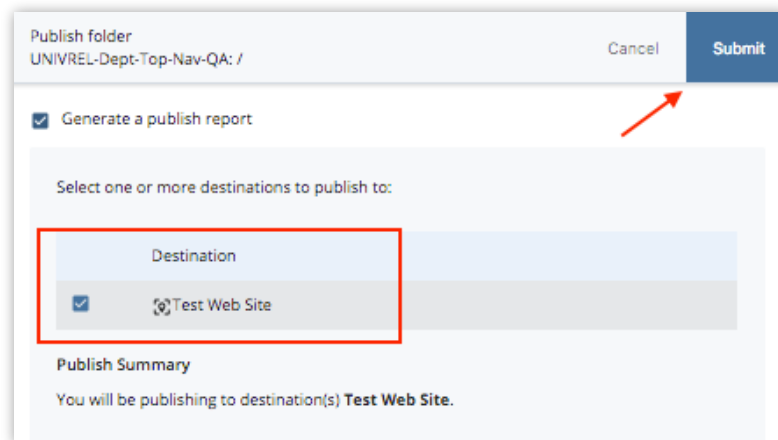
To view your latest published changes in a browser, you may need to refresh the page or clear your browser’s cache so it pulls the most recent information from the server.

The un-publishing process is simple:

1. Go to **More**→**Un-publish** and make sure you have the correct destination selected for un-publish task.



2. Locate and click the **Submit** button to un-publish. This will remove the asset from the live server but it will stay in Cascade.



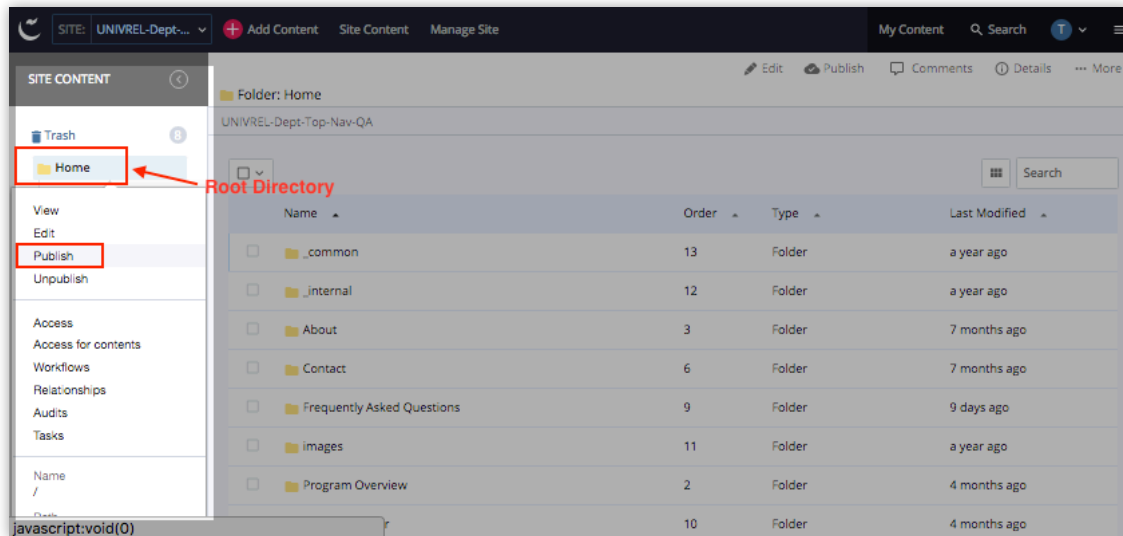
3. To ensure that the un-published asset doesn't show in the navigation of your site and stay out of publish queue, re-select the asset and go to **Edit** tab. Change the **Display in Navigation** setting to **No**. Then, go to **Configure** (Properties for a folder) and uncheck **include when publishing** checkbox. Locate and click **Submit** to save your changes to Cascade.
4. You may need to republish the parent folder of this asset or the whole site if the asset you just un-published appears in the navigation of your site.

Warning: When you un-publish, a visitor attempting to view that item will receive a **Page Not Found** message. If this is problematic for your organization, you should upload or create an asset using the old asset's name.

Publishing the Entire Website

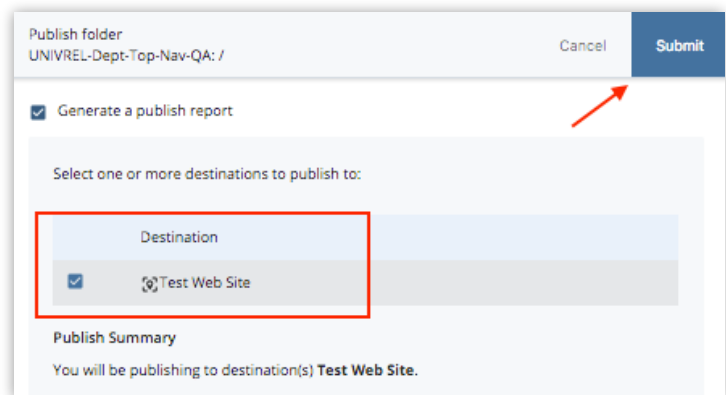
When you update a common element, such as your top navigation or the footer, you must publish the entire website. To publish the entire site:

1. Locate and click the root directory in the navigation panel or folder tree. It could be name **Home** or the name of your site.



2. Right click to see the in-context menu. This shows you some of the editing tasks for a folder.

3. Click **Publish** option. A page with live/test destinations will appear. Select the appropriate destination(s) and leave all other items checked to ensure everything publishes to your live site correctly.



4. Locate and click the **Submit** button.

NOTE: If you would like to see where your asset is in the university-wide publish queue, jump to **View Publish Queue** section of this document for further instructions.

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 Asset Names

In Cascade, the names of the actual files and folders are called Asset Names. Asset 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.

Asset 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 Asset Names.

It's also best to **avoid using dates** in Asset Names. This prevents you from having to create a new file or change the Asset 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.

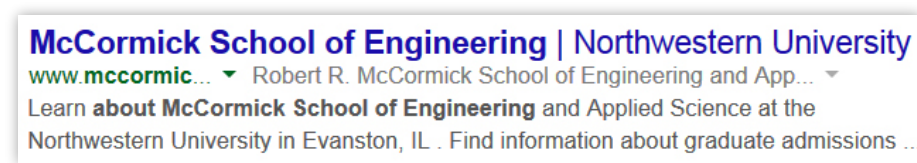
In Cascade, you can edit the title of your page under in the Edit tab, in the "Inline Metadata" section where it says "Title."

Include Metadata

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

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.

Include relevant search terms in the **Keywords** field. This will also help search engines like Google find your webpages.

A screenshot of the Cascade page editor's "Inline Metadata" section. It contains four text input fields: "Display Name *" with the value "About Us", "Title *" with the value "About Northwestern Engineering", "Keywords" with the value "whole-brain engineering, design thinl", and "Description" with the value "Learn about the McCormick School of". The "Keywords" and "Description" fields are highlighted with red rectangular boxes. At the bottom, there is a dropdown menu labeled "Display Page in Left Navigation?" with the value "Yes".

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

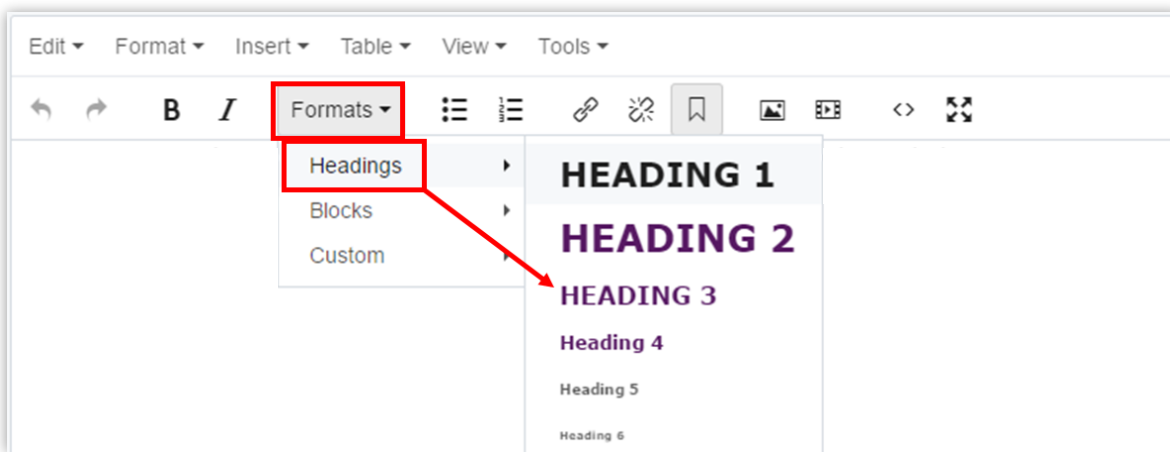
Google's search engine (and Northwestern's internal search appliance) gives more weight to pages containing search terms in header tags.

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:

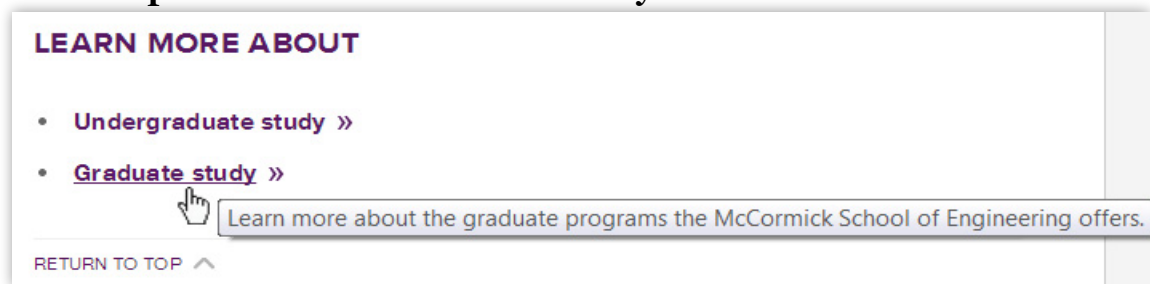
“Professor Smith has worked extensively with the Smith Catalysis Laboratory ([click here](#) for more info).”

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.

A screenshot of the "Insert/edit link" dialog box. It has a title bar with a close button (X). Inside, there are several fields: "Link Source" with radio buttons for "Internal" (checked) and "External"; "Link" with a button that says "Choose File, Page, or Link"; "Anchor" with an empty text box; "Text to display" with an empty text box; "Title" with a text box containing "Learn more about the graduate program the McCormick"; "Target" with a dropdown menu set to "None"; and "Class" with a dropdown menu set to "link-arrows". At the bottom right, there are "Ok" and "Cancel" buttons.

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>

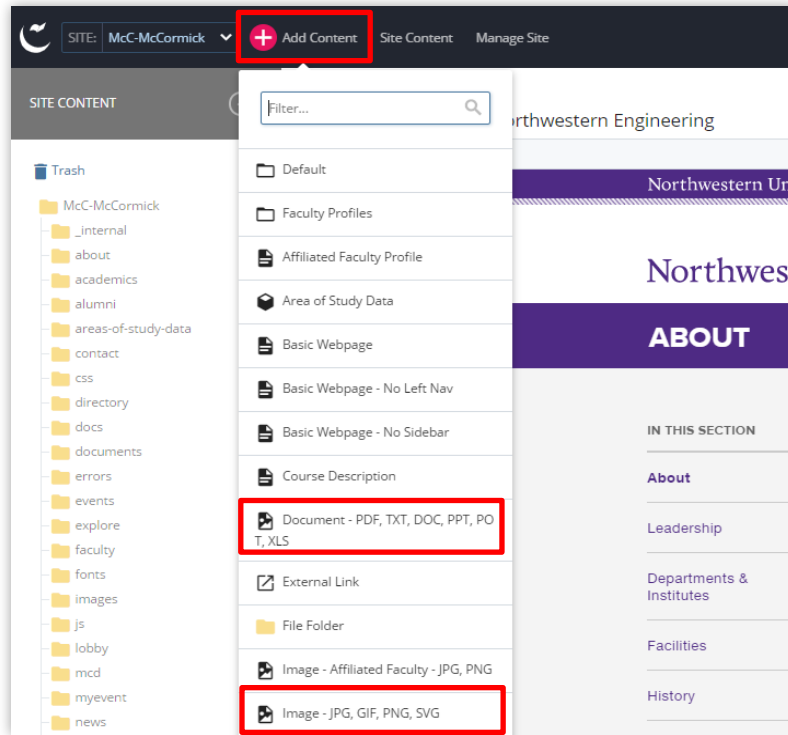
There are a few important things to keep in mind when preparing images:

- 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.

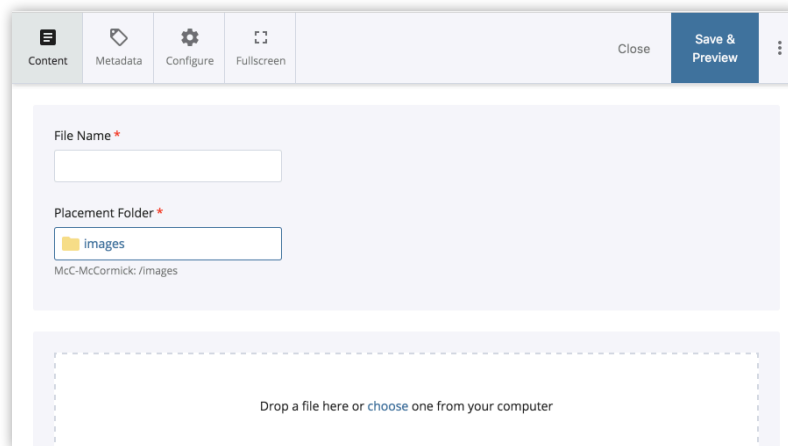
Generally .jpg and .png file types work well for most images and photos. Use .gifs for smaller images with blocks of color or animations.

Uploading Image/Doc

1. After navigating to the content page of the website you are editing, select “Add Content” > “Image – JPG GIF PNG SVG” for images and “Add Content” > “Document – PDF TXT DOC PPT POT XLS” for documents.



2. You can either drag and drop the file(s) to the noted area or choose one or more from your computer. You can upload more than one image or document at a time without zipping the files first. When uploaded, you'll see a preview and the dimensions of the file(s). Do not alter the image size in Cascade. All image resizing should be done in Photoshop or another photo editing software before uploading the image to Cascade.

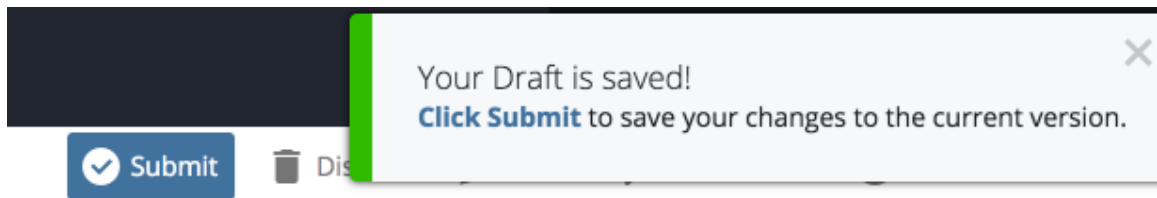


3. Once you've found and attached the file, the name of the file will be populated in the "File Name" field above.
 - a. You can then edit the name of the file in the field. Be sure the **File Name** of your new file follows the guidelines mentioned above (e.g., use keywords, all lowercase, no spaces, words separated by hyphens). Also specify the proper file extension (e.g., .pdf, .doc, .xls, .txt)
 - b. **Placement 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 **Save & Preview**. The next screen shows you a preview of the file. This is just a draft of the file you just uploaded. If the file looks okay, locate and click the blue **Submit** button on the editing screen.

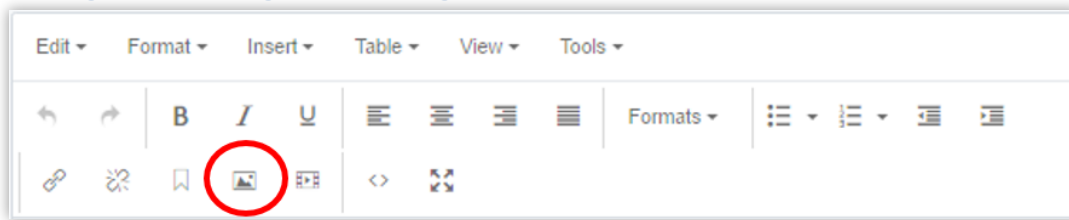
Important:

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

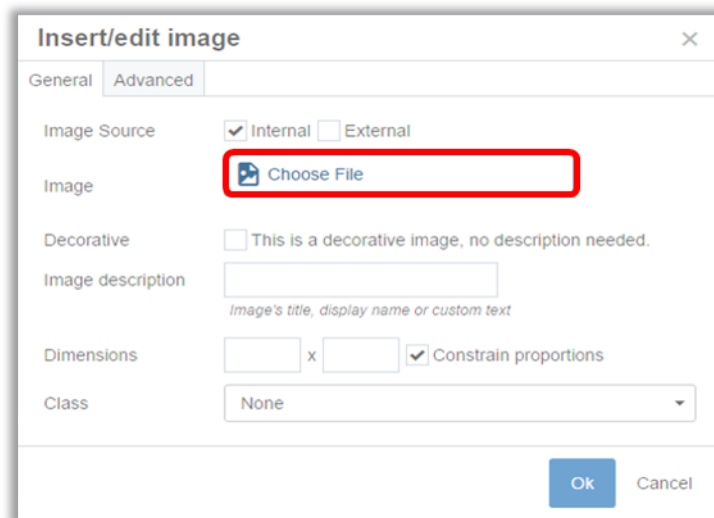
- Documents and non-image files go in your "documents" folder.
- Images go in your "images" folder.



Inserting an Image on Page

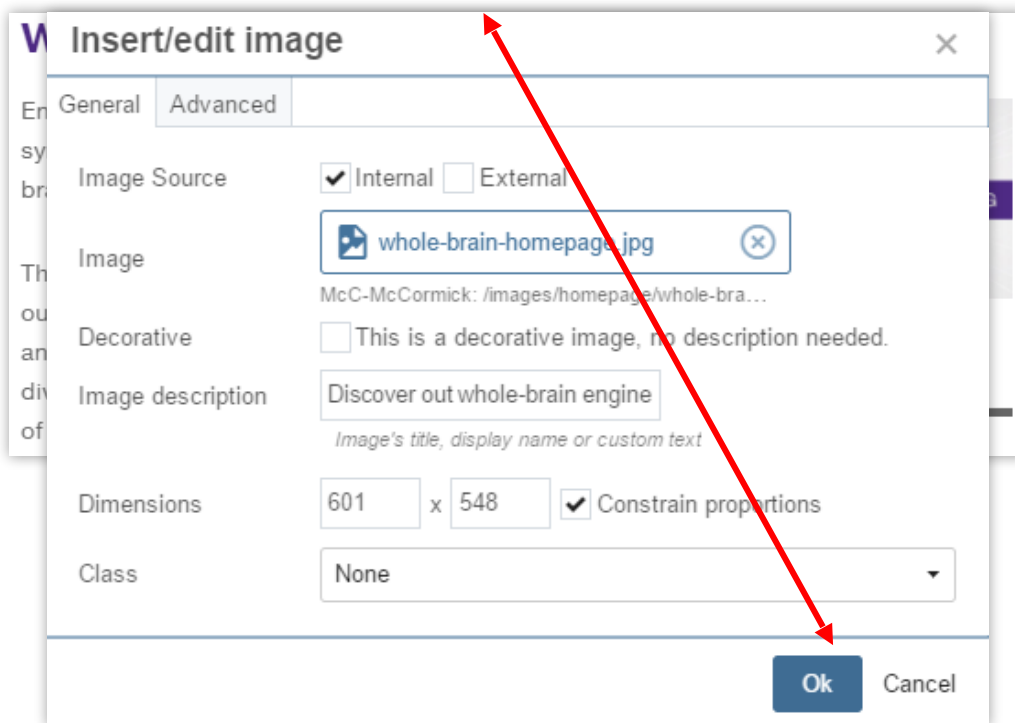


1. Place your mouse cursor in the area of the copy where you want to place an image, and click on the “Insert / Edit Image” icon (the mountain and the moon picture) in the toolbar.
2. Choose whether you want to create an internal or an external image. An internal image (default option) is a file that 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 the “Choose File” icon. Click on the icon.



In the new image chooser window, you can 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 sub-folders under the “images” folder to keep them organized.

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

6. 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](#)".
7. Click "Ok" 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.

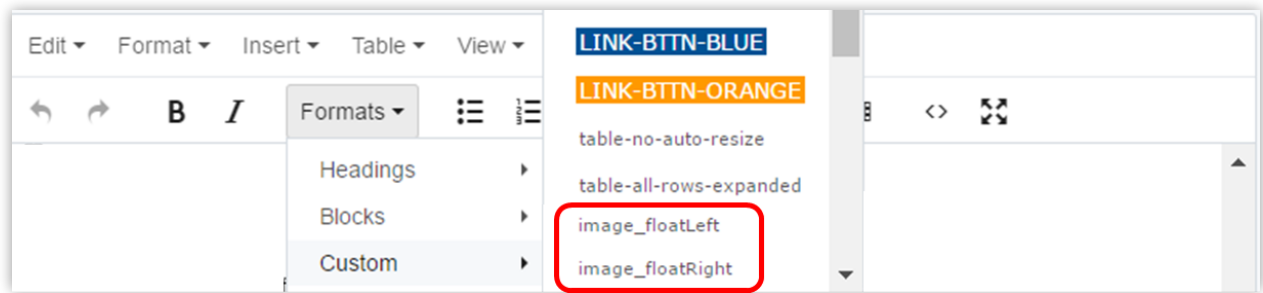
Assigning an Image Class

If you're planning on aligning an image to the right or left **you must use the "Formats > Custom" 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 “Formats” menu and then “Custom” menu. Select `image_floatRight` or `image_floatLeft`.



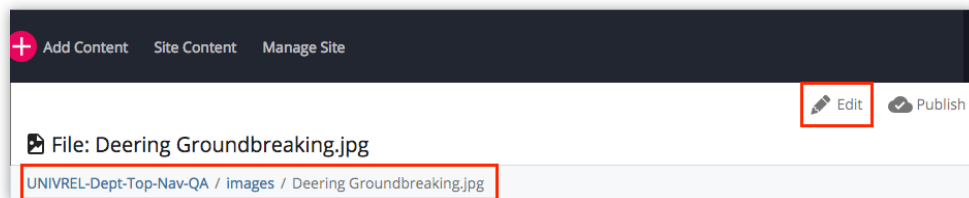
This will align your image to the right or left, and add padding around it, which keeps page text from getting too close.

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 “Format > Clear Formatting”  tool from the tool bar menu.** That step removes the previous alignment. Then you can select a new style or alignment from the “Format > Custom” drop down menu

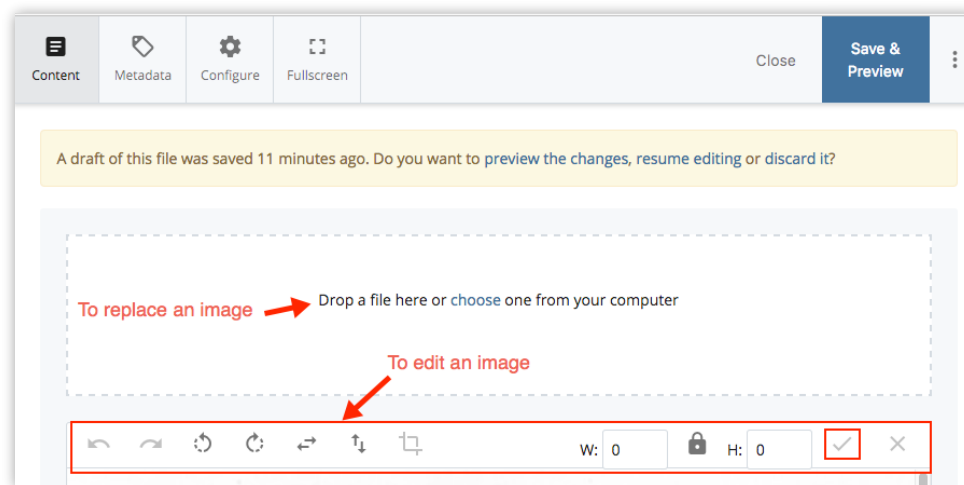
Editing and Replacing Images

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

- Locate and click the appropriate folder. Typically, images are saved under images folder.
- Click the image you wish to edit or replace. This will display a preview of the image or file (some files will not display) in the main Cascade window.
- Toward the top of the main window, locate and click **Edit**. The edit screen will load in the main window.

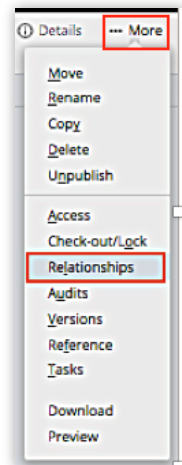


- On edit screen, you will see the option to replace the image and a toolbar that allows you to edit it. Make appropriate changes and click on **Save & Preview** button.
- You will be redirected to the image preview screen and get a confirmation popup at the top of the screen stating a draft was saved. If everything looks, click Submit to save your changes permanently in Cascade.
- Go to Publish tab and publish your changes to the live site.



- Next, go to **More→Relationships** tab and publish all relationships if the file has any. You will need to select the checkboxes to select the assets that you want to publish.

NOTE: You need to publish relationships only when you move, rename or delete a document or a webpage, or when you replace an existing document with a new one. You don't need to publish relationships when you're making any changes in the content itself.



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

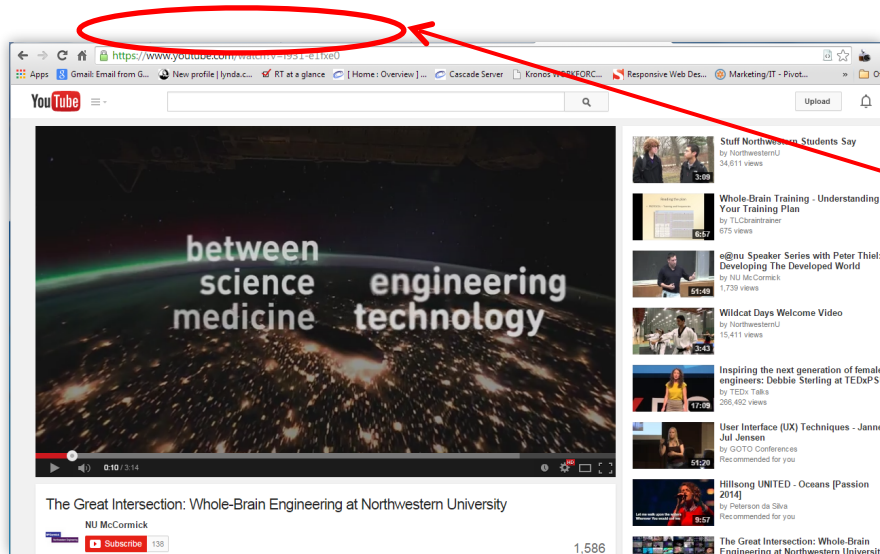
- Navigate to the existing image file in the “images” folder.
- Once the file is selected, click “Edit,” then use the “Upload” option to upload your new image. Cascade will point to the new image instead of the previous one.

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:

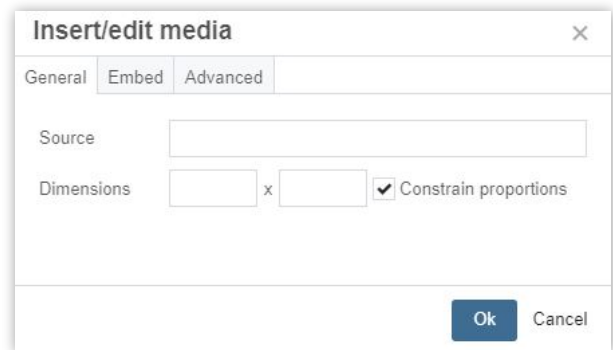


1. Go to that video's page on YouTube.

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: **670 x 377** for the basic page.

Click OK. A preview box will appear in your editing window indicating its placement on the page. You can preview the video on the editing window.

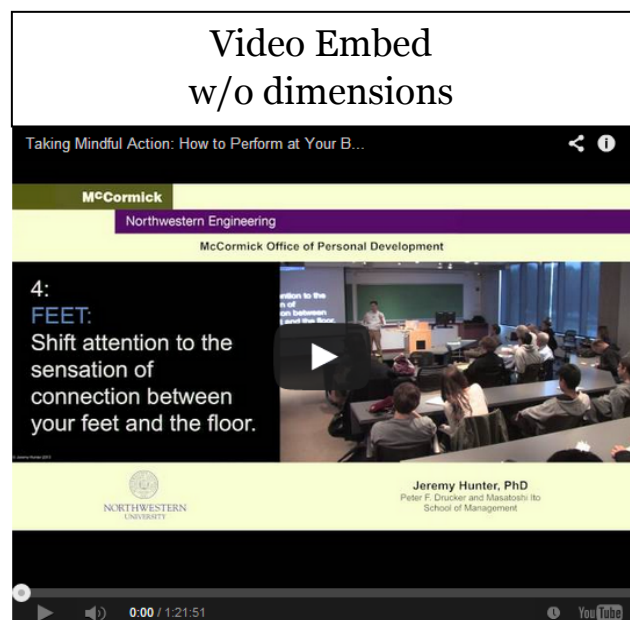


The dialog box has three tabs: General, Embed, and Advanced. The General tab is active. It contains a 'Source' text field, a 'Dimensions' section with two input boxes separated by an 'x', and a checked checkbox labeled 'Constrain proportions'. At the bottom right are 'Ok' and 'Cancel' buttons.

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.



Publish this page to see how it appears on the web by following the instructions in the section of this guide called [“Publishing Your Webpages”](#)

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.

Important:

The new website template is responsive, so **images will change in size and location** depending on the browser width or the device being used to view the website. Below are the specifications people should use to create and upload their images; the rest happens automatically.

Header Images

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

Images in Body Area of Basic Pages

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 “image_floatLeft” or “image_floatRight” styles:

If you want to wrap text around the image, when using “image_floatLeft” or “image_floatRight” image styles:

Keep your image **under 250-300 pixels wide** (about half the content area). Again, height can vary.

Smaller images should be around **40-60k**.

Images on People 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**.

Videos in Body Area of Basic Page

Embedded YouTube videos should be **670 x 377px**.

Module 4: Cascade Basics II – Structural Additions/Changes

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.

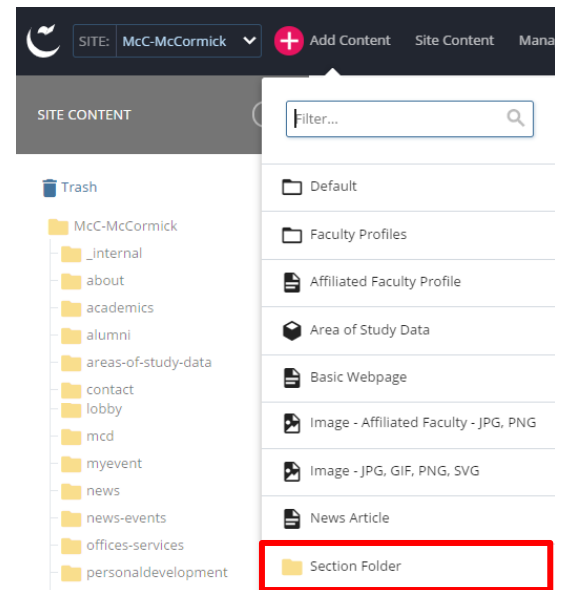
It is highly recommended that you **create a Section Folder in Cascade for each top-level link or section** you would like to appear in your left-hand navigation, even if you only plan to have one webpage in that section. There are two reasons for using folders this way:

- 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 Asset Name and location of that one page and possibly others. Since the Asset 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 "Add Content," and then click "Section Folder."



3. Replace the default "section" name in "Folder Name" (Asset Name) field with your new name. In this case, call it "student-projects."

NOTE: The 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 Asset Name.** In addition, it's important to use **keywords** in your Asset Names. The Asset Name becomes part of the URL path.

4. Make sure that the "Placement Folder" shown is the one where you want the new asset to "live." You can change the Placement Folder by clicking the input section. This will open a new window that will let you choose the correct Placement Folder.

A screenshot of a configuration window titled 'Folder Name *'. It contains several input fields and a dropdown menu. The 'Folder Name' field has 'student-projects' entered. The 'Placement Folder *' field shows a folder icon and 'McC-McCormick', with 'McC-McCormick: /' displayed below it. The 'Display Name *' field has 'Student Projects' entered. At the bottom, there's a 'Display Page in Left Navigation?' section with a dropdown menu currently set to 'Yes'.

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 Site Name folder (Here, McC-McCormick) which is indicated by [/]. If it is not chosen by default, select the folder and click "Choose."

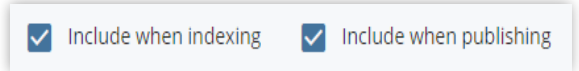
5. The section below contains the Display Name for your new section folder and the option to display it in the left navigation. New folders you create will be displayed in the navigation by default unless you select "No" in the dropdown.

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 at the top with “Properties,” there are two checkboxes that should be checked by default:

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

A screenshot of a user interface showing two checkboxes, both of which are checked. The first checkbox is labeled "Include when indexing" and the second is labeled "Include when publishing". Both labels are in a light blue font, and the checkboxes themselves are small blue squares with white checkmarks.

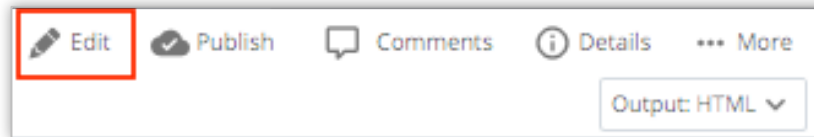
“Include when publishing” means that this folder and its contents can be published with the rest of your site, so they will appear on the live website.

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.

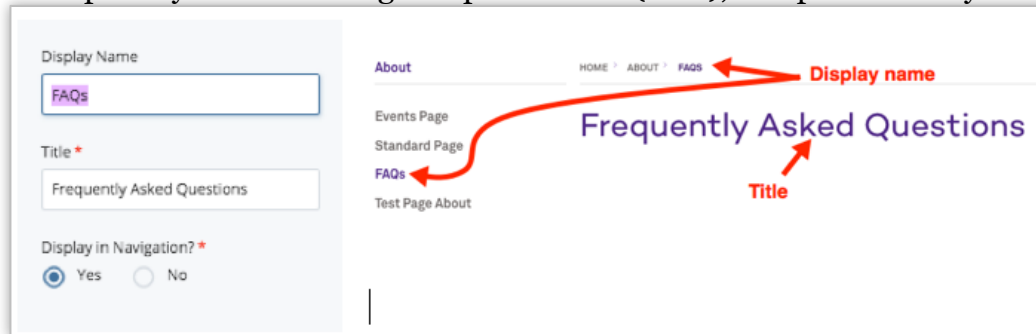
- From the preview window of the index page, go to the **Edit** option.



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** 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 "[Optimizing Your Content](#)" for more information about improving SEO.)

- When finished, click 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.

Responsive Note:

The left-hand navigation becomes condensed into the blue section menu at mobile screen sizes.

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 Menu Bar, click “Add Content,” then choose “Basic Webpage.” The “New Page” window will appear in your Main Panel.

The screenshot shows a 'New Page' dialog box. At the top, there's a navigation bar with 'Content', 'Metadata', 'Configure', and 'Fullscreen' tabs. To the right of these tabs are 'Close' and 'Save & Preview' buttons. The main content area is divided into sections. The first section has 'Page Name *' (text input with 'basic-page') and 'Placement Folder *' (dropdown menu showing 'McC-McCormick'). Below this is a section with 'Display Name *' (text input), 'Title *' (text input), 'Keywords' (text input), and 'Description' (text input). At the bottom, there's a 'Display Page in Left Navigation?' section with a dropdown menu set to 'Yes'.

3. Give your new webpage a **Page Name**.

Since your Page Name becomes part of that page’s URL, it is best to give your page a Page 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 “Placement 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. Click "Submit."

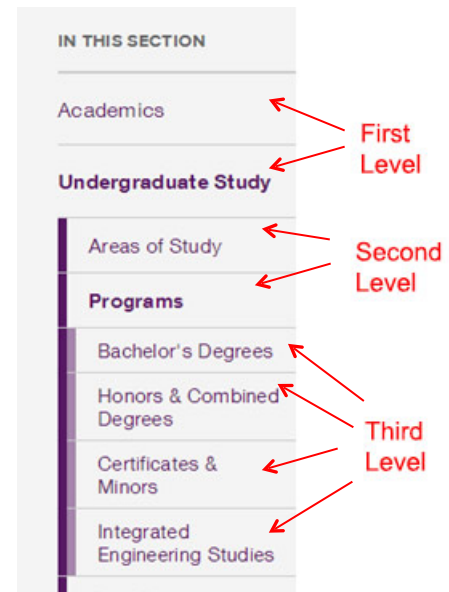
NOTE: You will need to manually publish your changes; see "[Publishing Your Webpages](#)" for more information on publishing pages.

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.



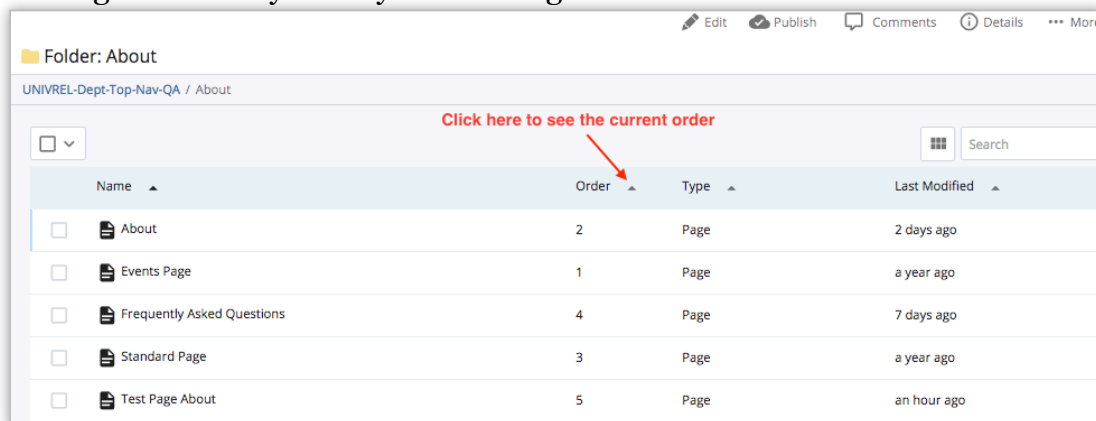
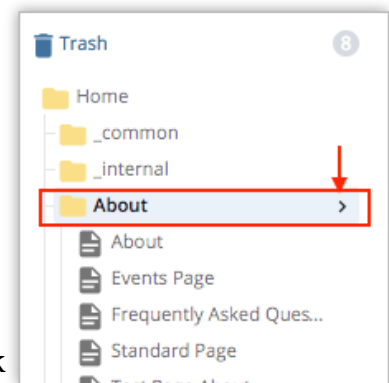
Folder Order: Changing Your Site's Navigation

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, hover over a desired sub-folder and click ">" to display its content on the site content panel.
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.

Copying Folders/Files

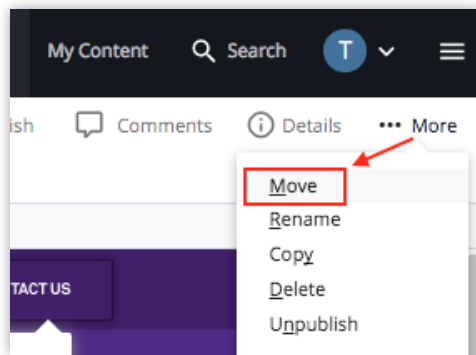
To copy a single folder or file, click on the folder or file and select **Copy** from the top menu. Specify the new system-name for the copied asset and new location. Submit.

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** from the top menu of the site content page. You can also hover over assets in the left navigation panel and right-click and select “Move” from the contextual menu.



On the next screen, select a New Folder. This opens a window that allows you to view folders within your site.

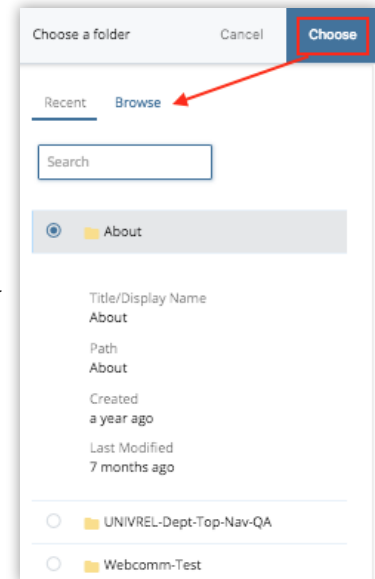
A screenshot of the 'Move page' dialog box. The title bar says 'Move page' and 'UNIVREL-Dept-Top-Nav-QA: /About/index'. There are 'Cancel' and 'Move' buttons in the top right. The 'Move' button is highlighted with a red box, and a red arrow points to it from the left. Below the title bar, there's a section for 'New Folder' with a text input field containing 'About' and a folder icon. Below that, there's a 'Workflow' section with a checkbox for 'Unpublish Content' which is checked. Below that, there's a section for 'Unpublish from Destinations' with a text input field containing 'About' and a folder icon. Below that, there's a table with columns 'Output' and 'Publish'. The table has one row with 'HTML' in the 'Output' column and 'All Destinations' in the 'Publish' column. Below the table, there's a section for 'Destination' with a checkbox for 'Test Web Site' which is checked.

In the folder navigation window, you can choose from the list of **Recent** folders, or **Browse** to the new folder, or perform a **Search**.

Click the Choose button to confirm the appropriate folder and to close this window.

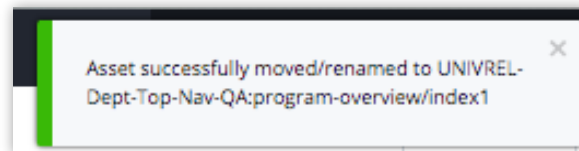
You'll go back to the **Move page** screen where you'll see **New Folder** field populated with the new folder that you just selected.

- Check **Un-publish Content** to remove the page from its original location on the live site as well as Cascade. **IMPORTANT:** If you do not check this box, a copy of the page will remain in its original location on the live site with no way to edit it in the future.



Locate and click **Move** button.

You are then taken to the page preview screen. A message at the top of the asset will confirming that the asset has been moved to the selected folder.



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 top box menu, select **Move**
- Specify the new location of the asset(s)

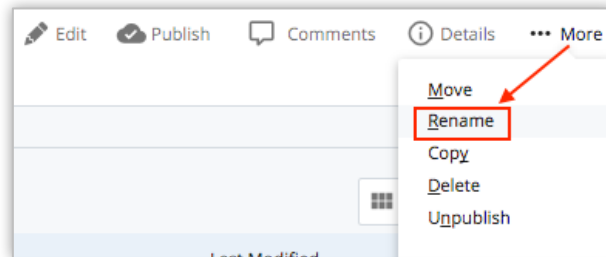
***NOTE:** There is no way to un-publish files from their original location while moving multiple files at once. Files should be un-published first by selecting Publish→Un-publish.

****NOTE:** If you're moving an asset that has been on the live site for a while, you might consider planning a redirect from the old url to the new url. Contact web-updates@mccormick.northwestern.edu if you need help with this step.

Renaming Folders/Files

If you wish to update the **Asset Name**, you'd need to **Rename** it.

1. Find the asset in your navigation panel and click on it.
2. From the preview window, go to the **More→Rename** option.



3. Next, enter a new name for your asset in **New Page Name** field. For folder and files, you will see New Folder Name and New File Name fields. Make sure that the name you enter here is all lower case. Replace any spaces with dashes.

A screenshot of the 'Rename page' dialog box. The title bar says 'Rename page' and 'UNIVREL-Dept-Top-Nav-QA: /title'. There are 'Cancel' and 'Rename' buttons. A red '2' is next to the 'Rename' button. Below the title bar, there is a red '1' above a text input field labeled 'New Page Name *'. The input field contains the text 'test-page'. Below the input field, there is a section titled 'Unpublish Content' with a checked checkbox. Underneath, it says 'Unpublish from Destinations' and provides a warning: 'Previously published versions of the asset will remain on the webserver with the old path unless unpublished. Unpublishing from the remote server will delete the out-of-date content from the chosen Destinations.' There are two tables. The first table has columns 'Output' and 'Publish'. It has one row with a checked checkbox, an HTML icon, and the text 'All Destinations'. The second table has a column 'Destination'. It has one row with a checked checkbox and the text 'Test Web Site'.

4. After you're done making your changes, save the page and publish it to the live site. See [Publishing or Un-publishing Your Assets](#) section of this document for further instructions.

When we say rename an asset, we are talking about changing the Asset Name. Renaming assets in Cascade will change the URL of the asset on the website. However, we recommend never renaming an index page. Every folder should have an index page.

***NOTE:** If you're renaming an asset that has been on the live site for a while, you might consider planning a redirect from the old url to the new url. Contact web-updates@mccormick.northwestern.edu if you need help with this step.

Publishing Folders/Files

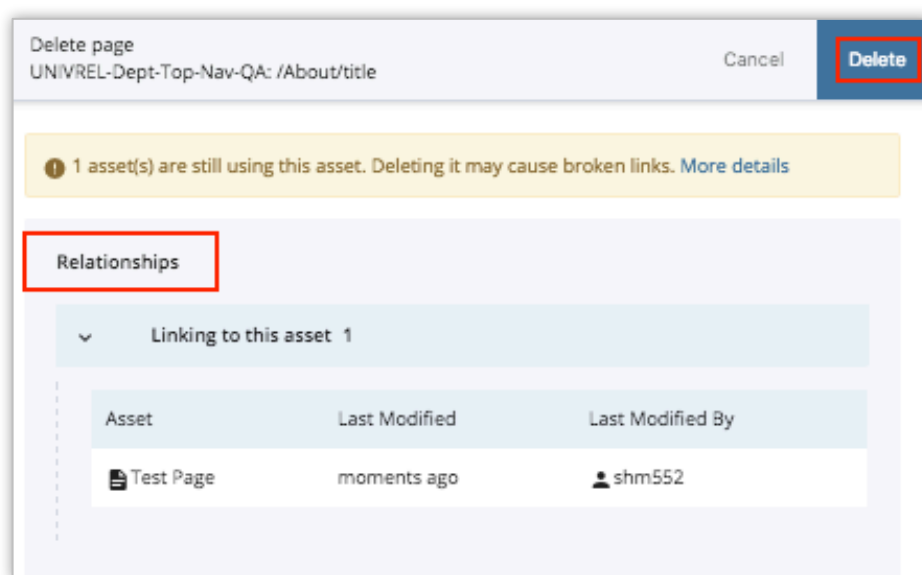
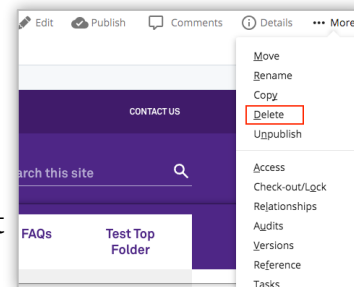
You can publish **individual** pages, **multiple** pages, and **entire** folders.

- **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 top box menu, 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 the **More** option and the **Delete** option in the dropdown menu.
- 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>. 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: Other Helpful Tips

Mark Content for Review

You can mark your assets for review if you want to update the information on a regular basis or on a certain date. Assets that are marked for review will be listed on your dashboard under **Content to Review** section. To do this, follow the steps below:

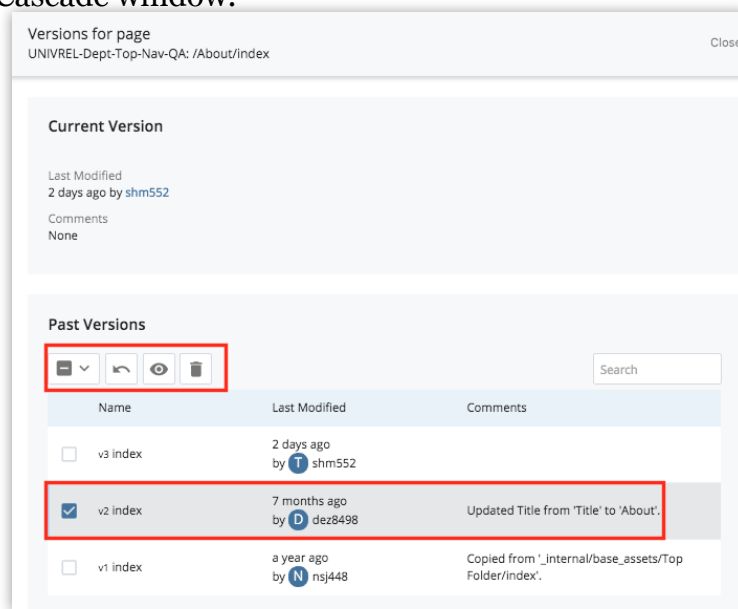
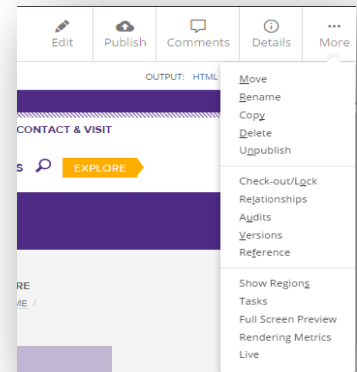
1. Go to the site and select the asset you want to mark for review.
2. In the preview window, locate and click on **Edit**. This opens a new window.
3. In the next window, switch to **Metadata** tab. Scroll down to enter a review date and click **Save and Preview** button to save a draft. On the next screen, you'll see the option to **Submit**. You don't need to publish the asset after this step.

The screenshot shows a 'Metadata' tab interface with the following elements:

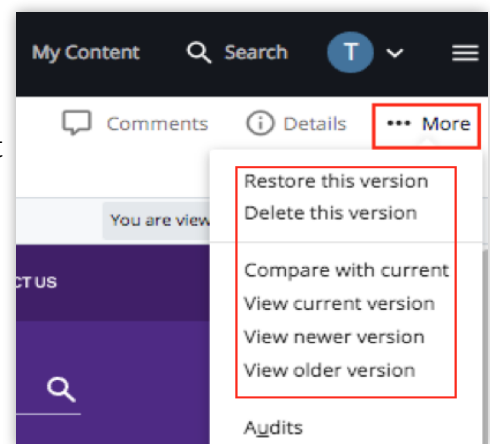
- Top Bar:** Includes tabs for 'Content', 'Metadata', 'Configure', and 'Fullscreen'. On the right, there are 'Close' and 'Save & Preview' buttons. The 'Save & Preview' button is highlighted with a red box.
- Section Header:** '2 - Save and Preview' is displayed in red text at the top right of the form area.
- Form Fields:**
 - Summary:** A large text area for entering a summary.
 - Teaser:** A text input field.
 - Keywords:** A text input field.
 - Description:** A text input field.
 - Author:** A text input field.
 - Start Date:** A text input field with a placeholder 'mm-dd-yyyy hh:mm a'. A note above it states: 'The asset will be published at this date if it is enabled for publishing. However, until this date is reached, this asset will not be indexable or publishable.'
 - End Date:** A text input field with a placeholder 'mm-dd-yyyy hh:mm a'.
 - Review Date:** A text input field with a placeholder 'mm-dd-yyyy hh:mm a'. This field is highlighted with a red box.
 - Expiration Folder:** A dropdown menu with a 'Choose Folder' button.
- Annotation:** '1 - Enter a review date' is written in red text next to the 'Review Date' field.

Versions

- Cascade retains **the 90 most recent versions** of an asset
- To view previous versions, select an asset in the left navigation panel, 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.
- Locate and click the version you would like to view. A preview of the previous version is displayed in the main Cascade window.



- If you want to view other versions, you can click on **More** to see other viewing options. You can view an older version, view a newer version, view current version, delete the version or restore it. Notice that the **More** dropdown doesn't list any of the in-context editing options like move/delete/publish.
- If you wish to roll back to the version you are viewing, click on **Restore this version**. Cascade will create a copy of the old version and this will become your newest version. You may edit this version or just publish to the live site.



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 is 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

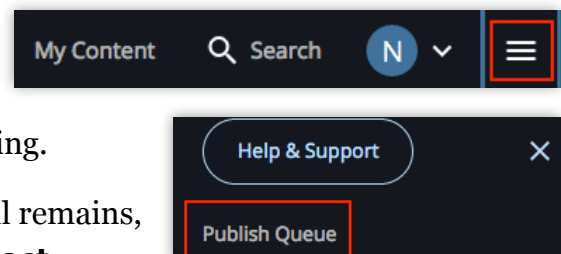
If the page still doesn't load correctly after publishing, it might be a **caching** issue related to your Internet browser:

- 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 it that page (or other assets) is still in the process of publishing.

To check the publishing queue in the content page:

- Select the Help menu on the top right of the toolbar.
- Then select "Publish Queue". 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.