



UH CMS Basics Training

- **C**ontent **M**anagement **S**ystem
- Paradigm shift >> Stronger more unified UH identity
- Enables non-technical contributors
- Also enables magical illusions
- And is designed to be a Web-Page Factory

CMS Overview

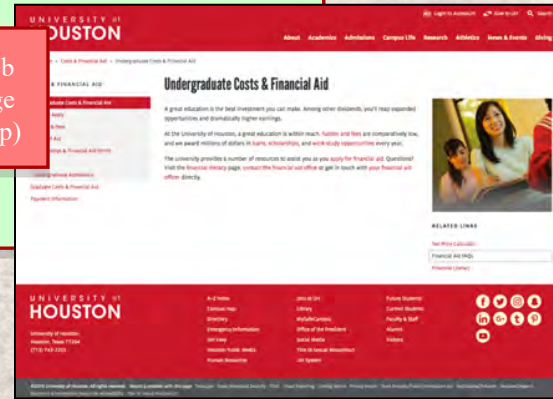
Server hosting
the CMS

CMS
Page
Asset



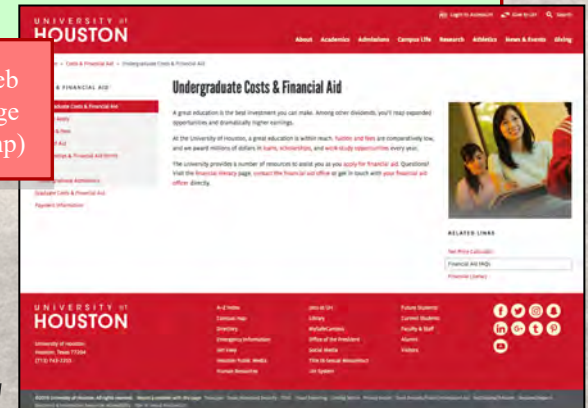
staging/testing server

Web
Page
(.php)



LIVE/production server

Web
Page
(.php)



Web-Page Factory

Server hosting
the CMS

*Cross-platform availability
via Browser access*

CMS
Page
Asset

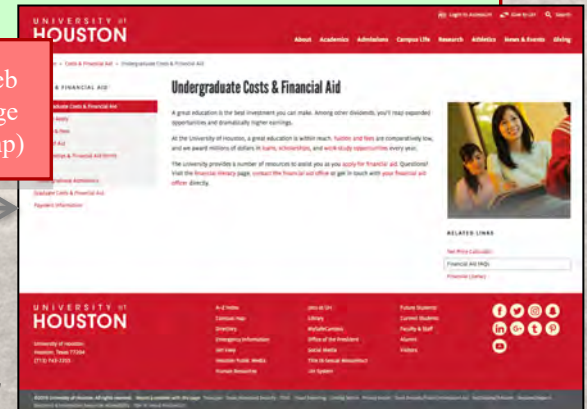
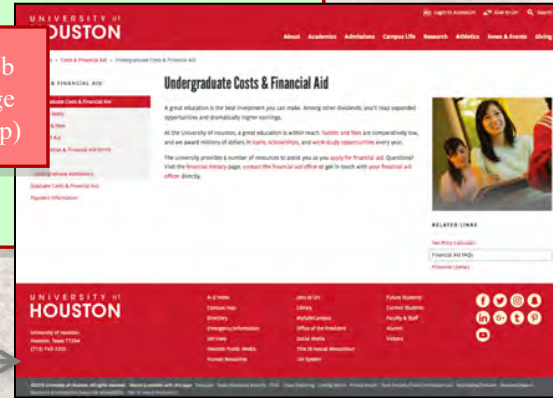
staging/testing server

Web
Page
(.php)

Browser
Views

LIVE/production server

Web
Page
(.php)



Web-Page Factory

Server hosting
the CMS

staging/testing server

Web
Page
(.php)

Cascade is not a live-edit application

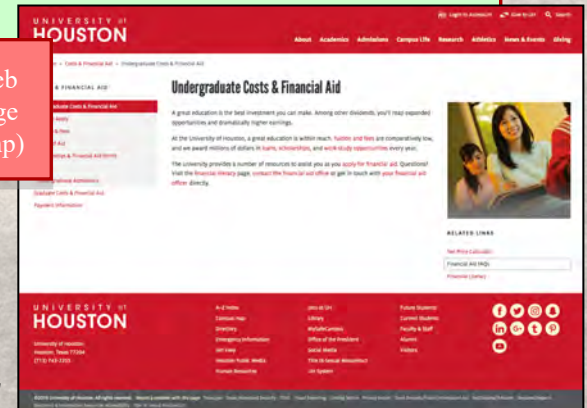
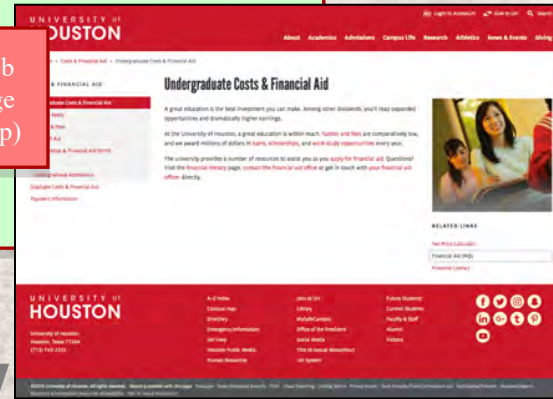
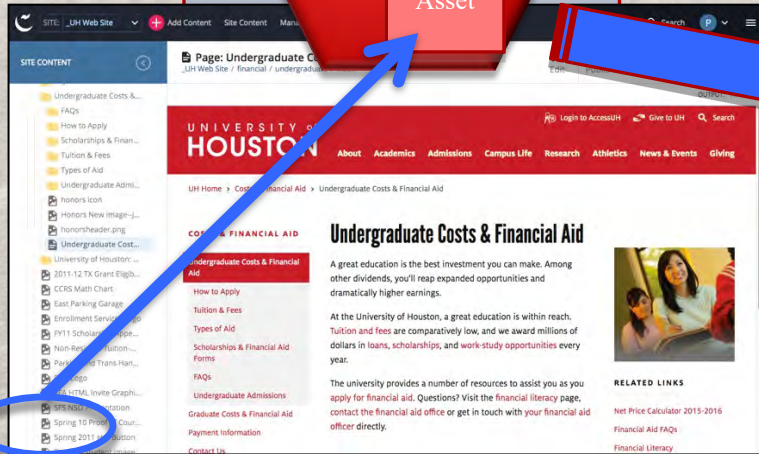
CMS
Page
Asset

Publishing required

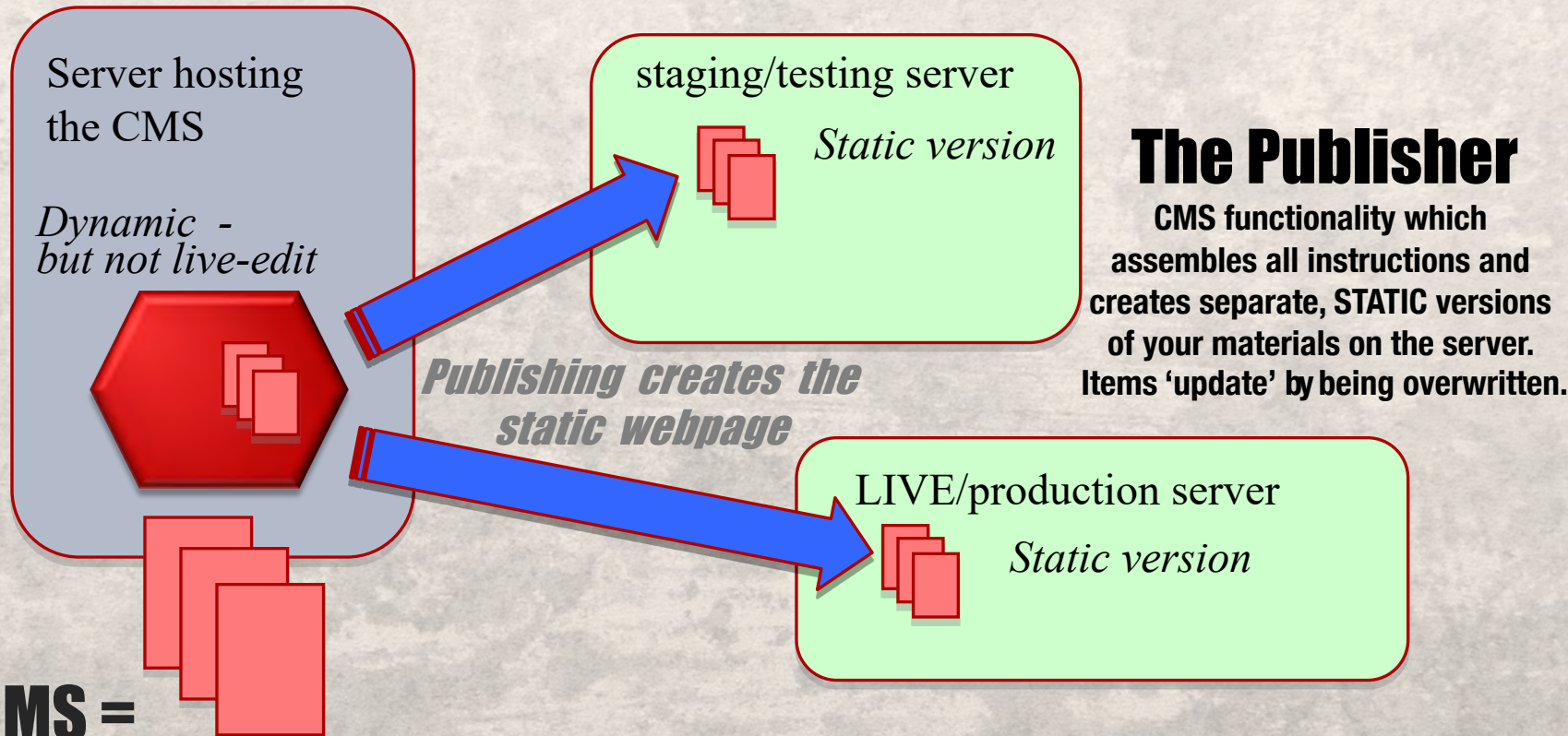
LIVE/production server

Web
Page
(.php)

Web-Page Factory

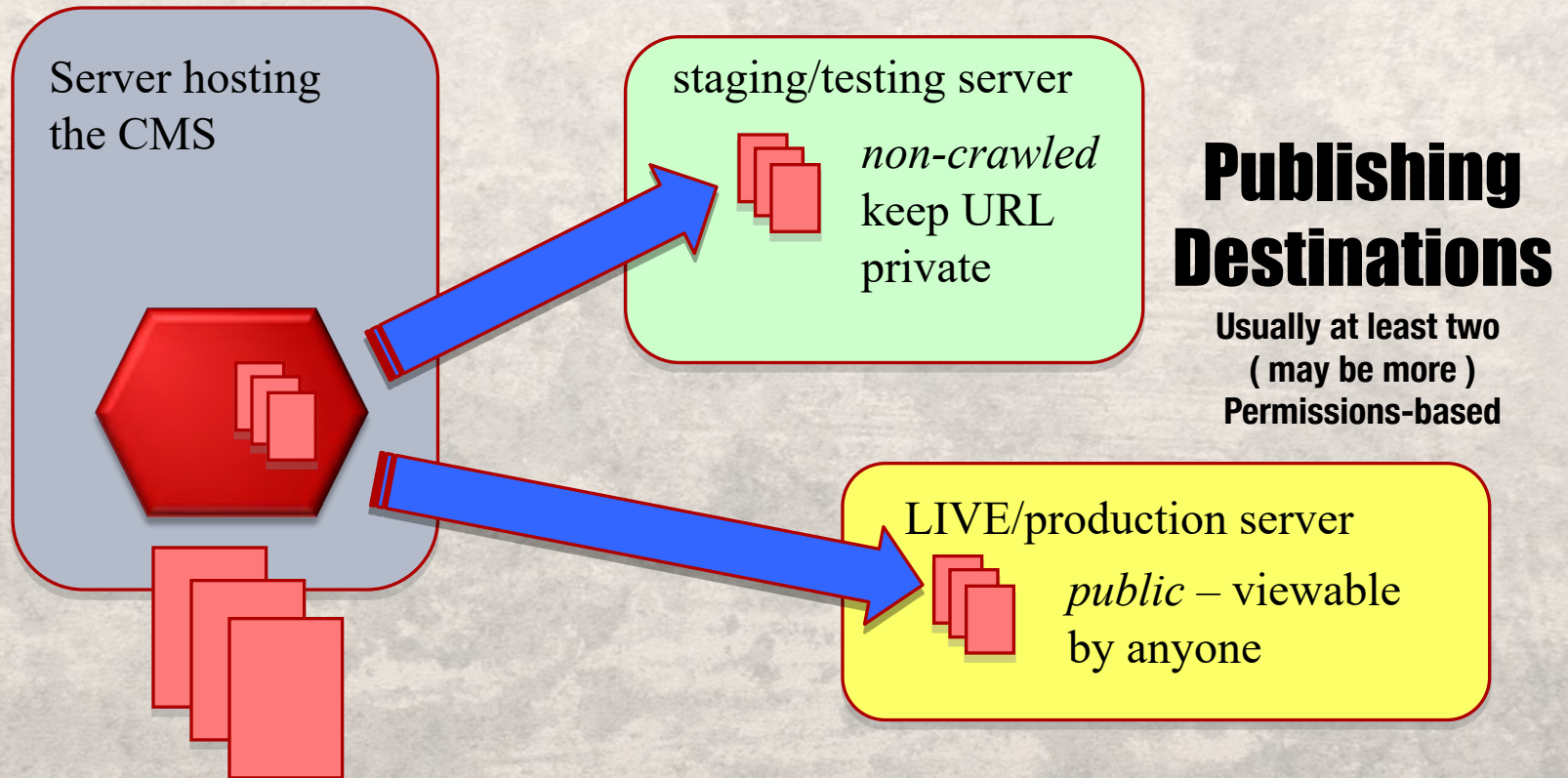


CMS TERMINOLOGY



internally, dynamically, manages your site's resources: pages/files/graphics /links/etc... *and also* acts as that 'Web Page Factory' – via its built-in Publisher functionality. Upon Publishing, the Publisher assembles all the various pieces (*some you see and work with, others you may never see*) into your final web page(s), and then writes all the needed files to your site's designated server location(s) as *static* page files.

CMS TERMINOLOGY



If you are granted permission to publish to a non-crawled staging address, then that URL will be passed along to you.

Always avoid the use of staging/test URLs as links for live pages.

Cascade will manage “internal” links for you – i.e. any links created using the Chooser tools.

“External” inks – those requiring a manually entered URL - must not point to non-crawled web addresses.

SOME CMS BEST PRACTICES

1

**Build
and
preview
inside CMS**

Server hosting
the CMS



staging/testing server

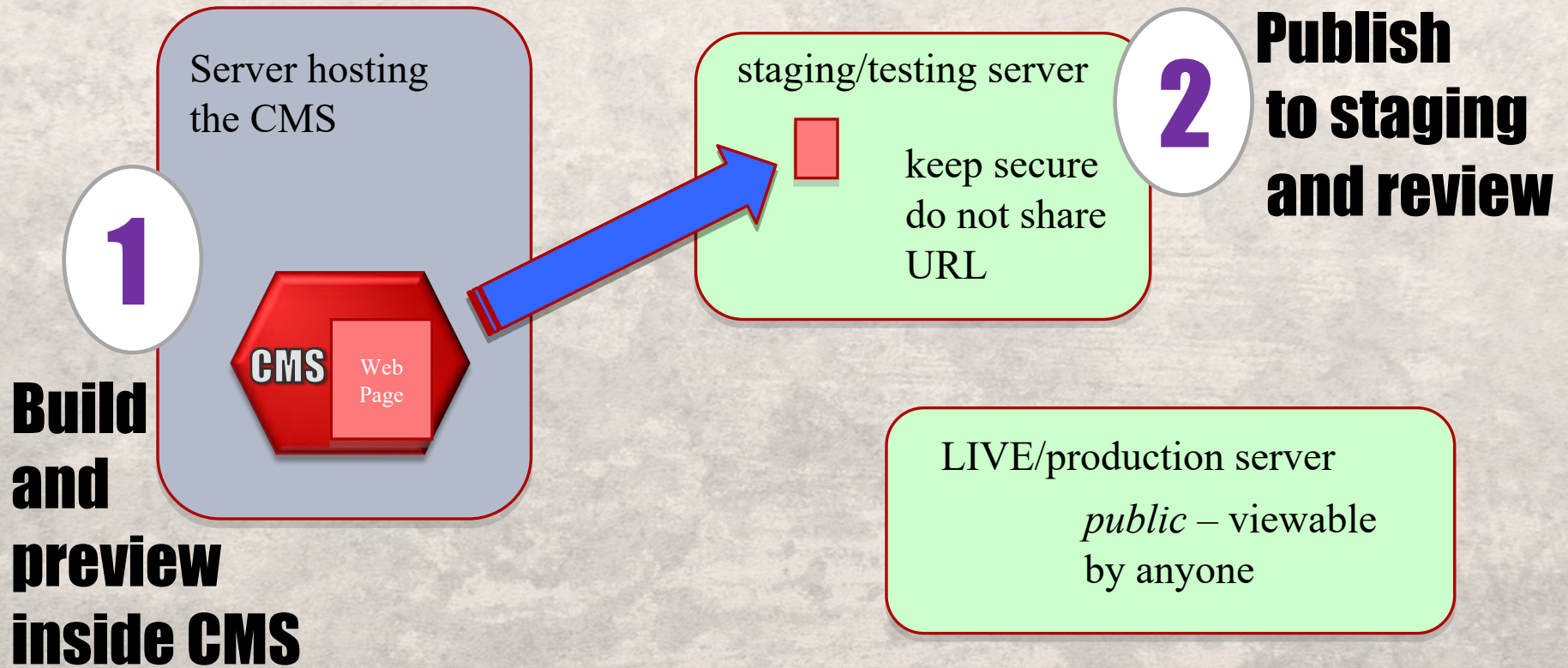
keep secure
do not share
URL

LIVE/production server

public – viewable
by anyone

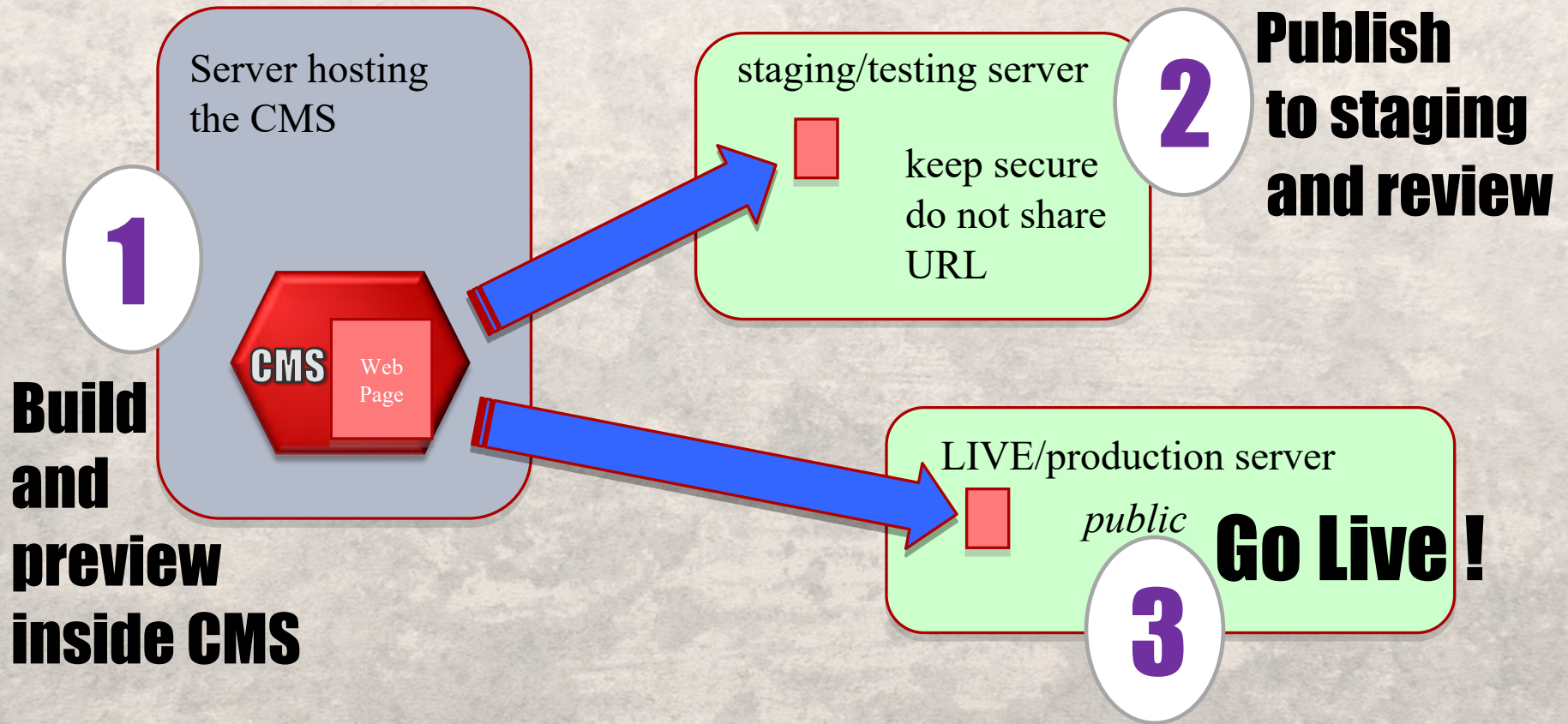
Web-Page Factory

SOME CMS BEST PRACTICES



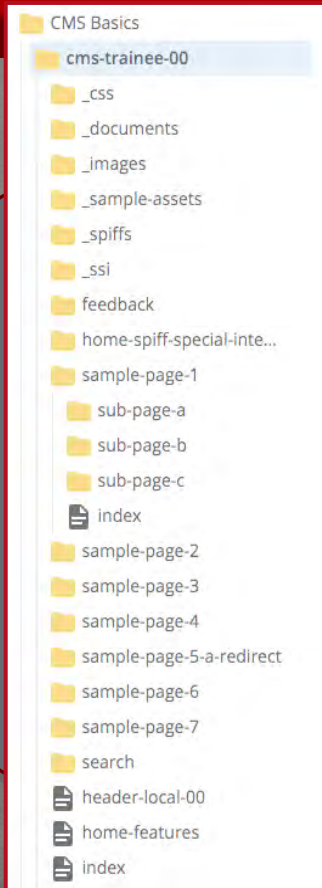
Web-Page Factory

SOME CMS BEST PRACTICES



Web-Page Factory

CMS TERMINOLOGY



staging/testing server

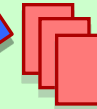


non-crawled
keep URL
private

The Publisher

Writing files to the server
is really what
the CMS is all about!

LIVE/production server

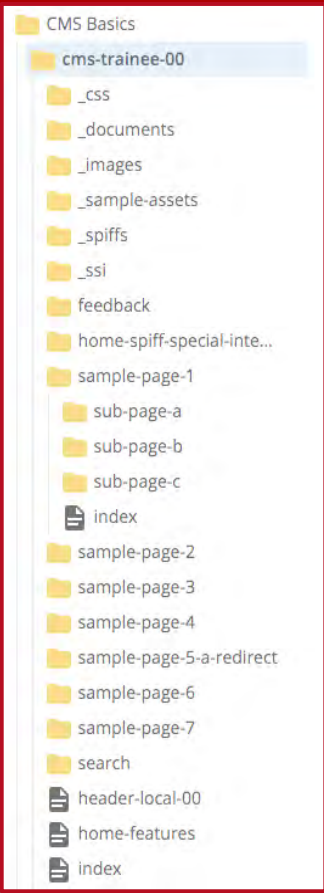


public – viewable
by anyone

CMS:

The CMS Publisher “duplicates” your site structure by writing files to the server using the same relative organization you see with your site’s Asset Tree in System Name View.

Asset Tree System Names in CMS = File Structure on the Server



CMS TERMINOLOGY

staging/testing server



non-crawled
keep URL
private

The Publisher

Writing files to the server
is really what
the CMS is all about!

LIVE/production server

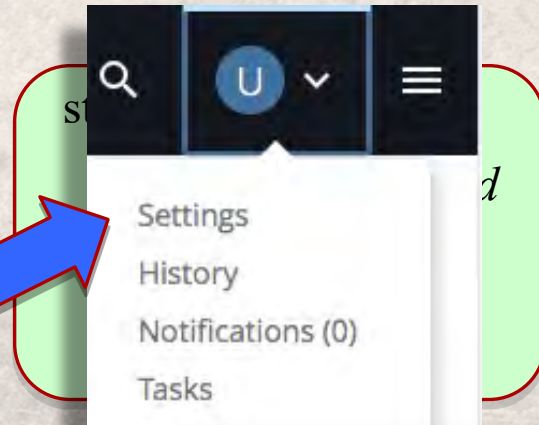
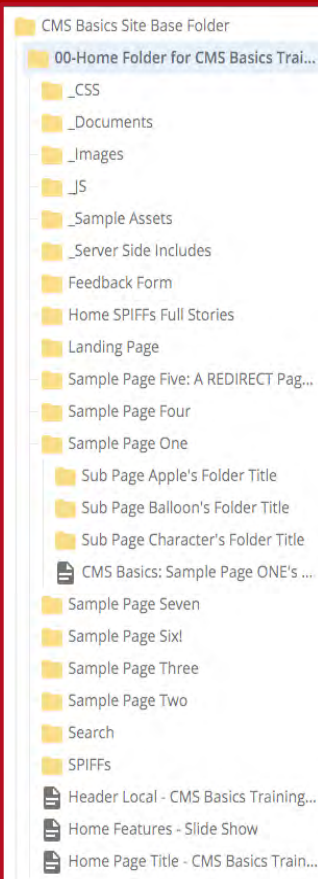


public – viewable
by anyone

CMS:

Thus, Publishable assets which are: Renamed, Moved, or Deleted will change your site structure. Cascade automatically un-publishes items for which these 3 actions have been taken, to help keep the server free of unwanted materials. Un-publish can also be done manually when wanted. Re-publishing/New publishing is always at the discretion of a Publish-enabled site editor.
Caution: an editor lacking live publishing might not be able to thus clean up unwanted live files.

CMS TERMINOLOGY



Asset Titles

== Title Metadata
User's initial default view

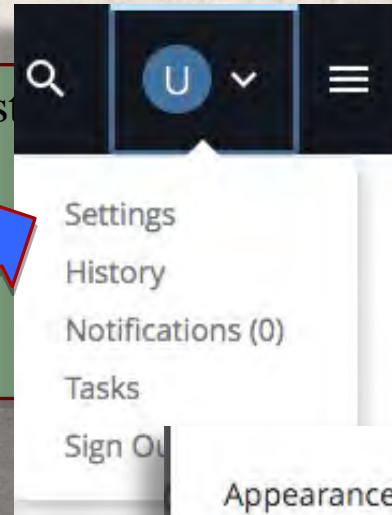
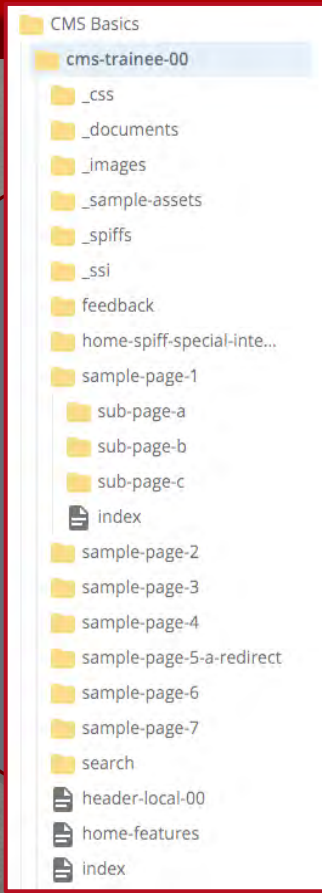


CMS:

In Cascade v.8 Users can switch between System Name and Asset Title views.
Shown above: Asset Tree in Title View = Show asset's Title ✓ checked.

User area > Settings > Appearance of Asset Links > checkbox toggle

CMS TERMINOLOGY



Asset Names
== System Names
To view, check User Settings



CMS:

In Cascade v.8 Users can switch between System Name and Asset Title views.
Shown above: Asset Tree in system-name View = Show asset's Title unchecked.

User area > Settings > Appearance of Asset Links > checkbox toggle

SOME CMS BEST PRACTICES

System Names:

- Should be all lower-case characters (can include numbers)
- Should contain no spaces
- Prefer dashes over underscores to separate words
- Avoid “special” or punctuation characters within the name - *e.g.*
! @ # \$ % & * () = ? . , ; “ ”
*And only use the **period character** to introduce FILE extensions please!*
- Relates exactly to the Web address of published materials
- Cascade *system names* become server *filenames*
- Won't usually show in the webpage's content areas
- Wholly distinct from Metadata (*but they should coordinate*).

Know System Name rules

SOME CMS BEST PRACTICES

The CMS Metadata Set:

- Every Asset is eligible to carry and use information assigned to it from a standard set of metadata *categories*:
 - **Display Name**
 - **Title**
 - **Description**
 - **Other:** Article Author, Keywords, Summary, Teaser; Start Date, End Date, Expiration Folder, Review Date; **Custom Fields** (esp. **Folder metadata which can govern the Left Nav, site header/footer**)
- Learn more: <https://www.uh.edu/infotech/services/web-services/cms/cms-how-tos/understand-metadata/>

Metadata text is likely to be *visible to your site visitor*, and so it *should* be grammatical - use those Capitals & spaces!
It can also contain limited punctuation (e.g. ‘&’ for ‘and’)

Understand CMS Metadata

SOME CMS BEST PRACTICES

System information vs Metadata - **tips:**

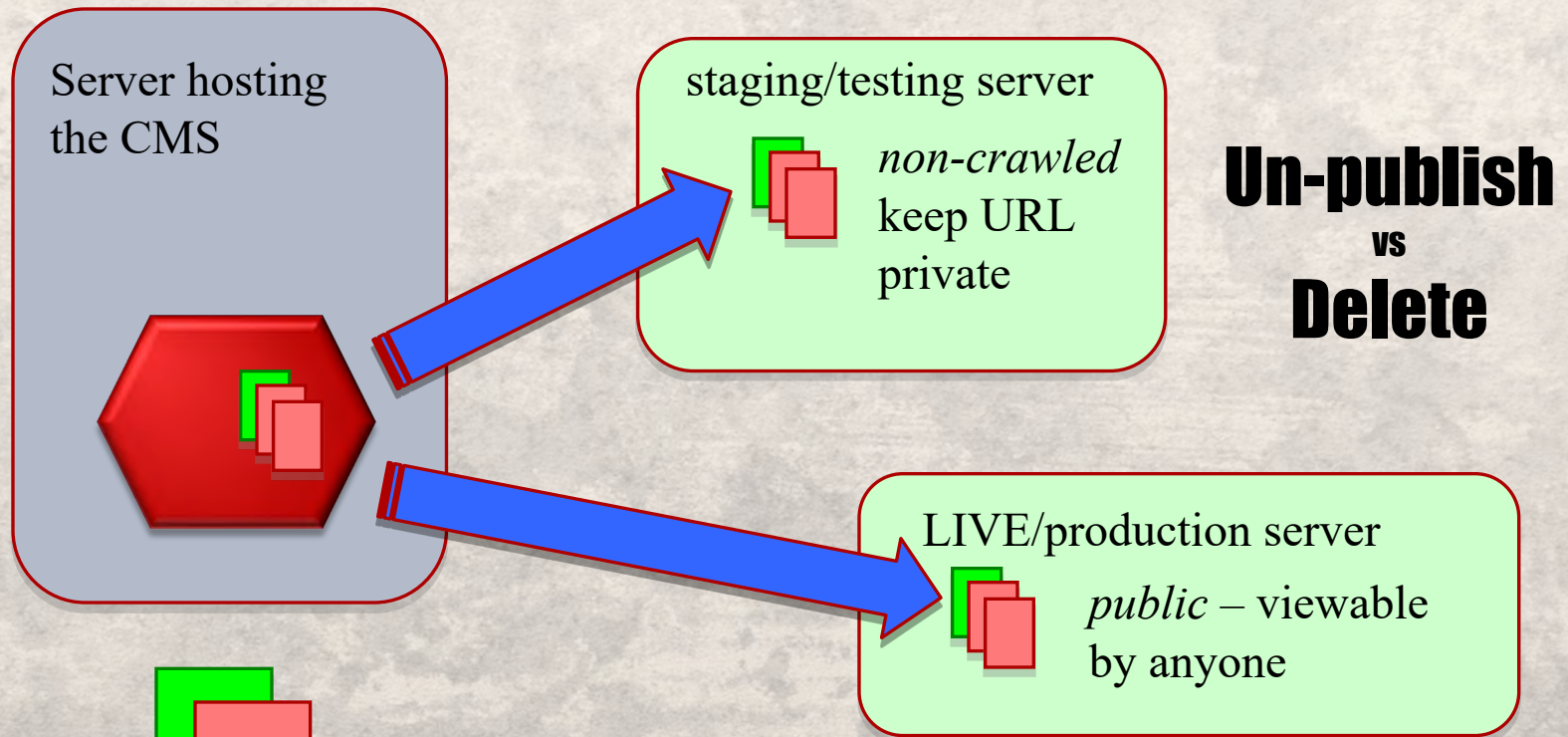
- **Metadata** text is ALWAYS changed under the **Edit** panel for any asset. It may be set when an asset is created, or added later.
- **System names** are set originally when an asset is 1st created, and can be changed:
 - from the **Rename** dialog;
 - or when using a **Copy** dialog.

NOTE: While you may often want to change **Folder** or **File system names**, please remember: **Pages which publish out as the default page within a Folder, and are intended to display directly to the public, will have a default system name of “index” and this system name should not be changed.** Changing the system name of a default page will cause automated navigation items to break.

Exceptions may include things like News articles, which may be numerous within a single Folder and have their own content-owner-decided naming conventions (e.g. encoded date and subject matter) and navigation scheme.

Understand the Differences

CMS TERMINOLOGY



Un-publish
vs
Delete

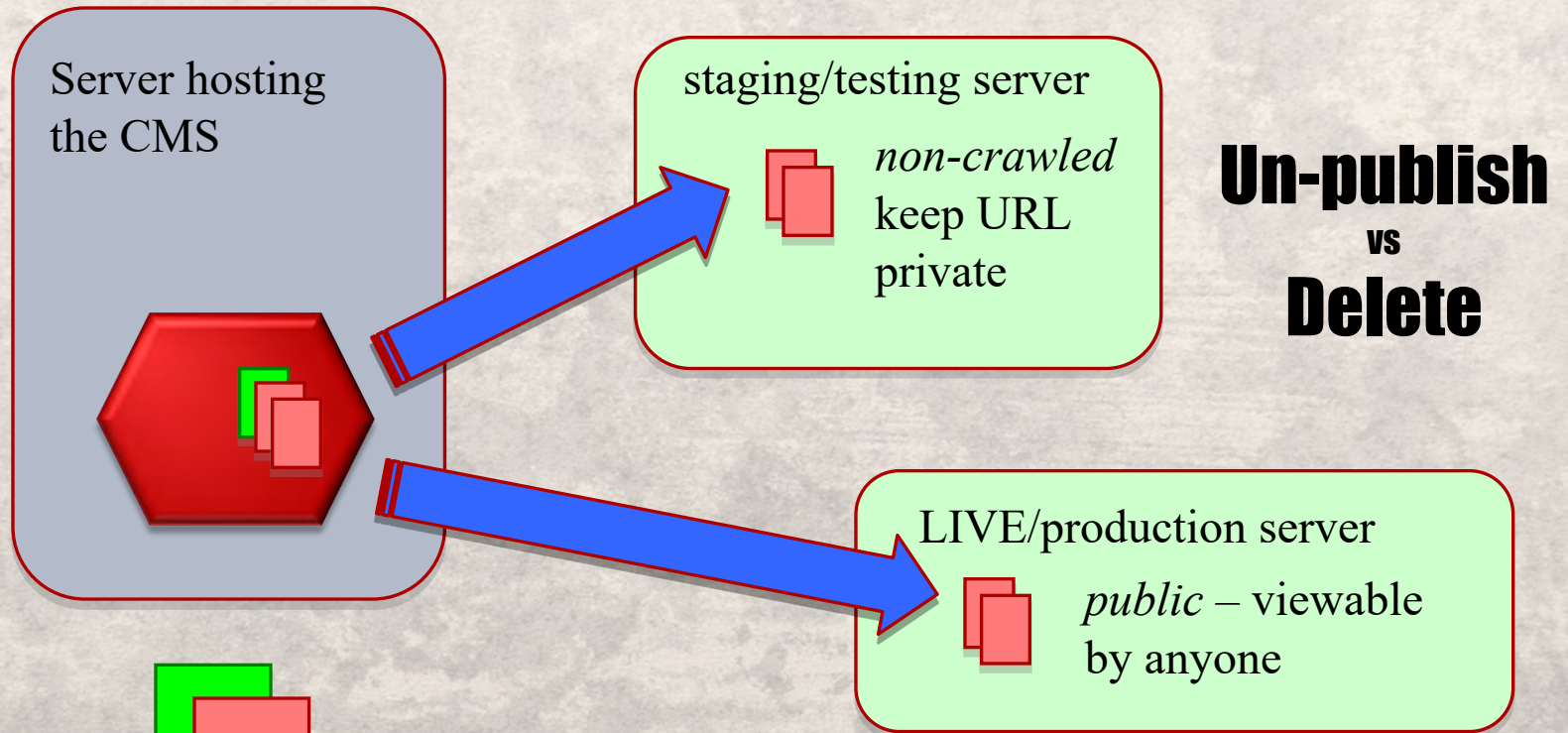
CMS:

Un-publish

=

keeps asset in CMS but gets rid of it from the server.

CMS TERMINOLOGY



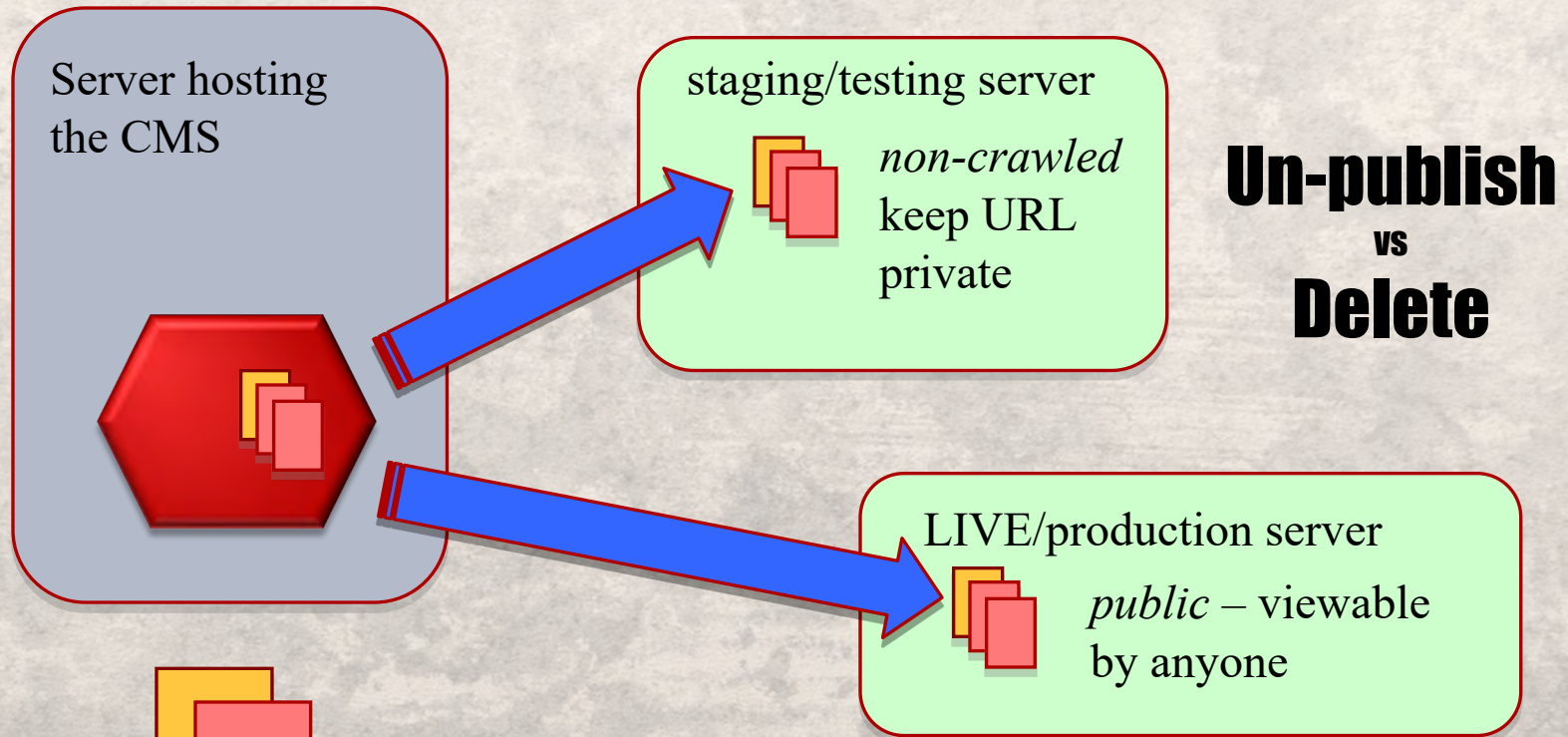
CMS:

Un-publish

=

keeps asset in CMS but gets rid of it from the server.

CMS TERMINOLOGY



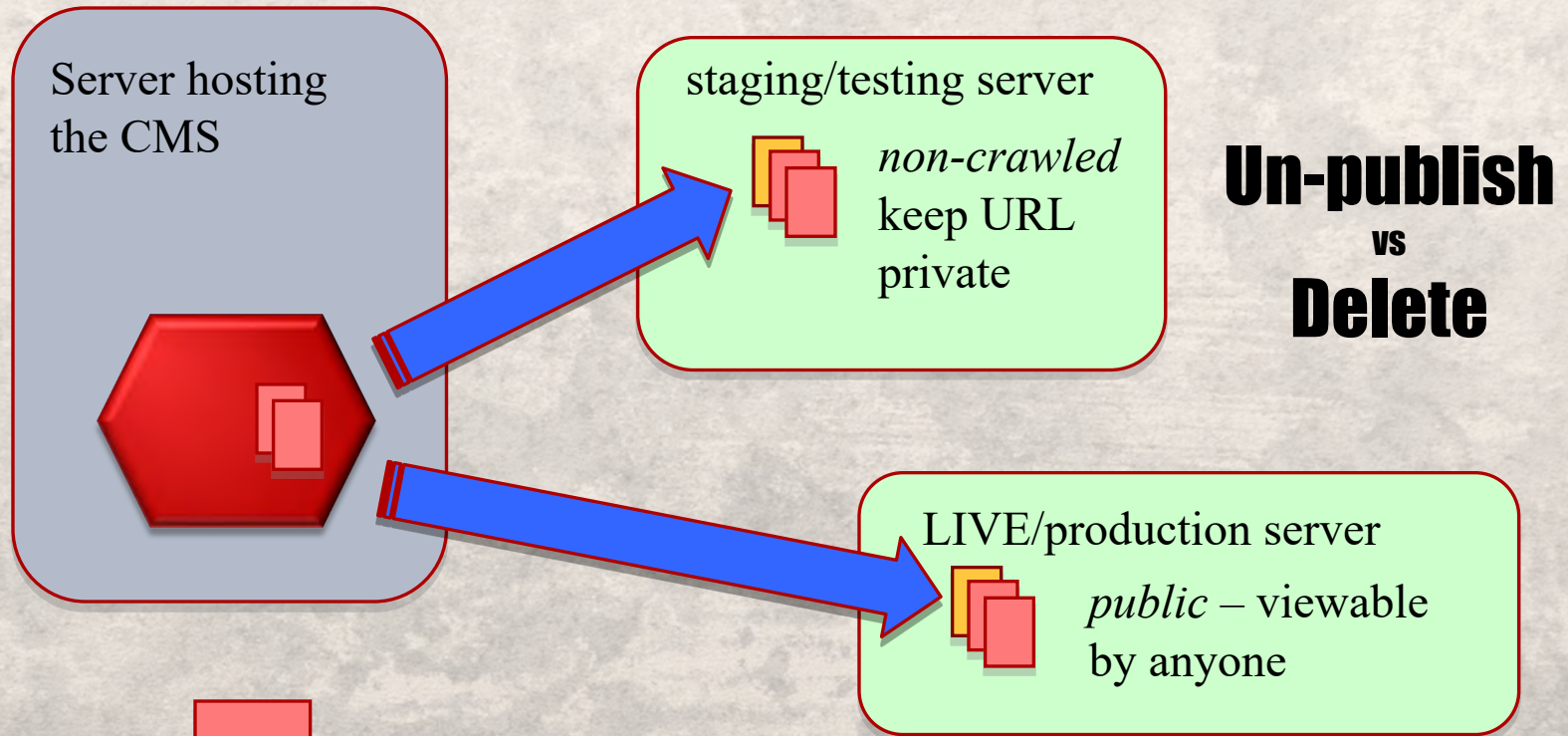
Un-publish vs Delete

CMS:

Un-publish = keeps item in CMS but gets rid of it from the server.

Delete = removes items from CMS itself.

CMS TERMINOLOGY

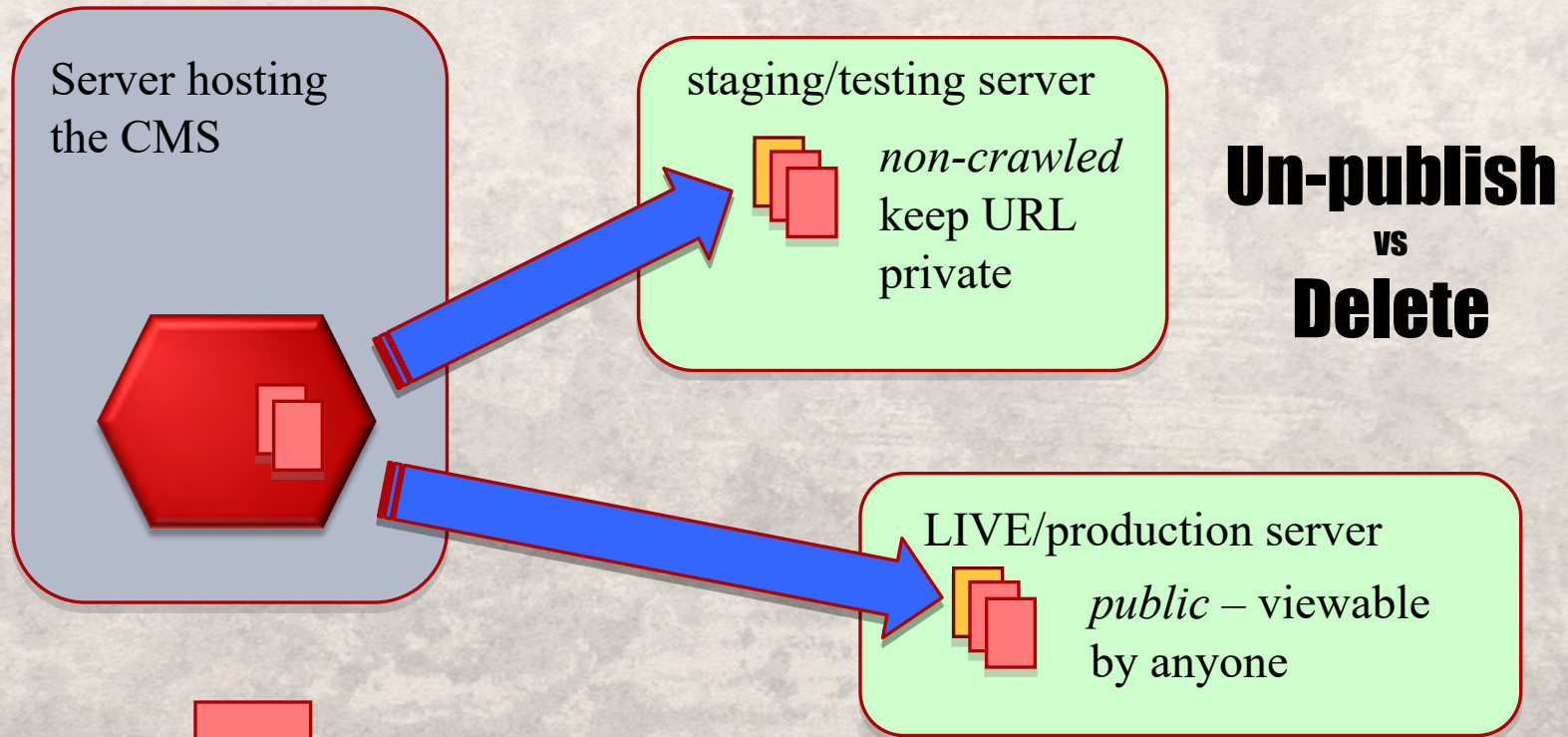


CMS:

Un-publish = keeps item in CMS but gets rid of it from the server.

Delete = removes items from CMS itself.

CMS TERMINOLOGY

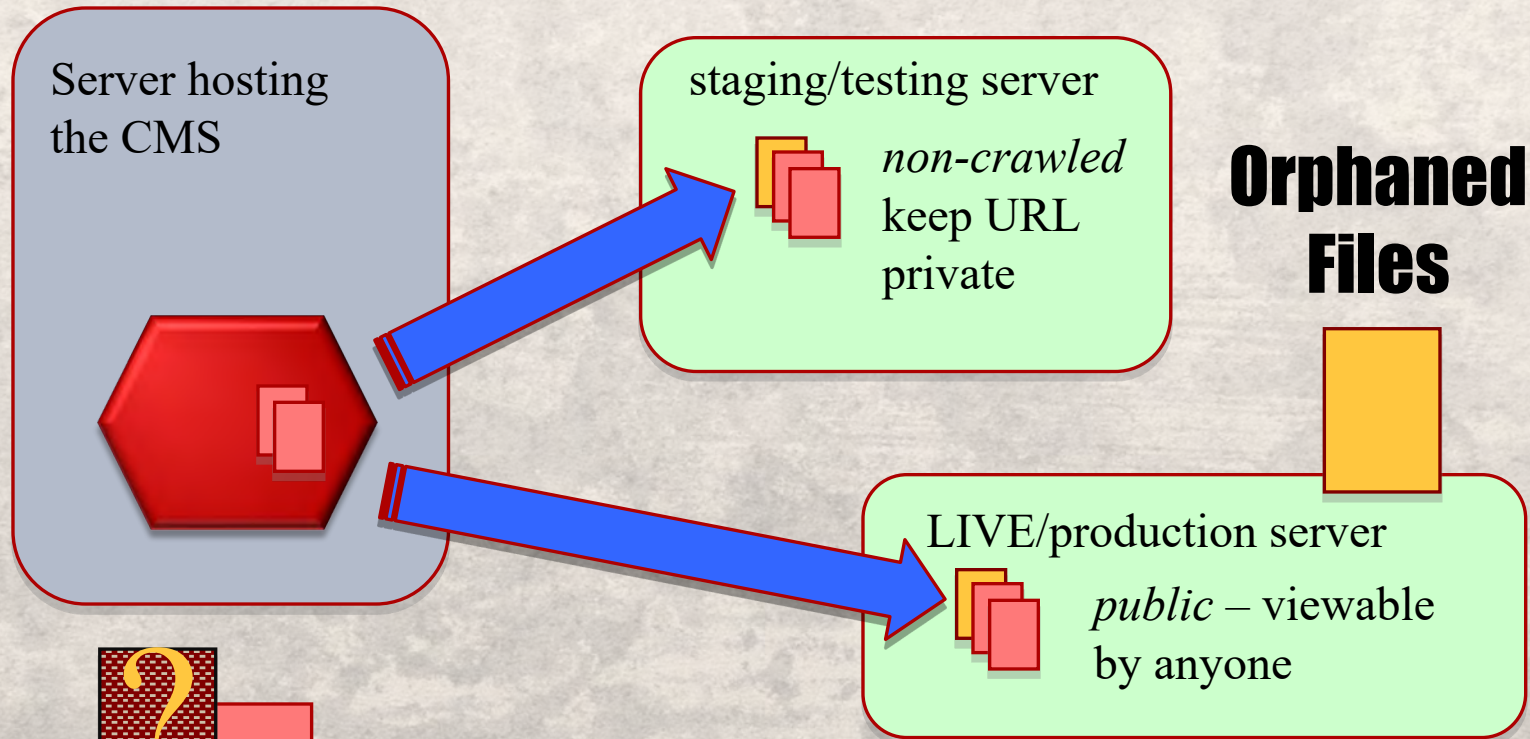


CMS:

Un-publish = keeps item in CMS but gets rid of it from the server.

Delete = removes items from CMS itself – so, remember the 'unpublish' part, or you could leave 'orphaned' files for search engines to find.

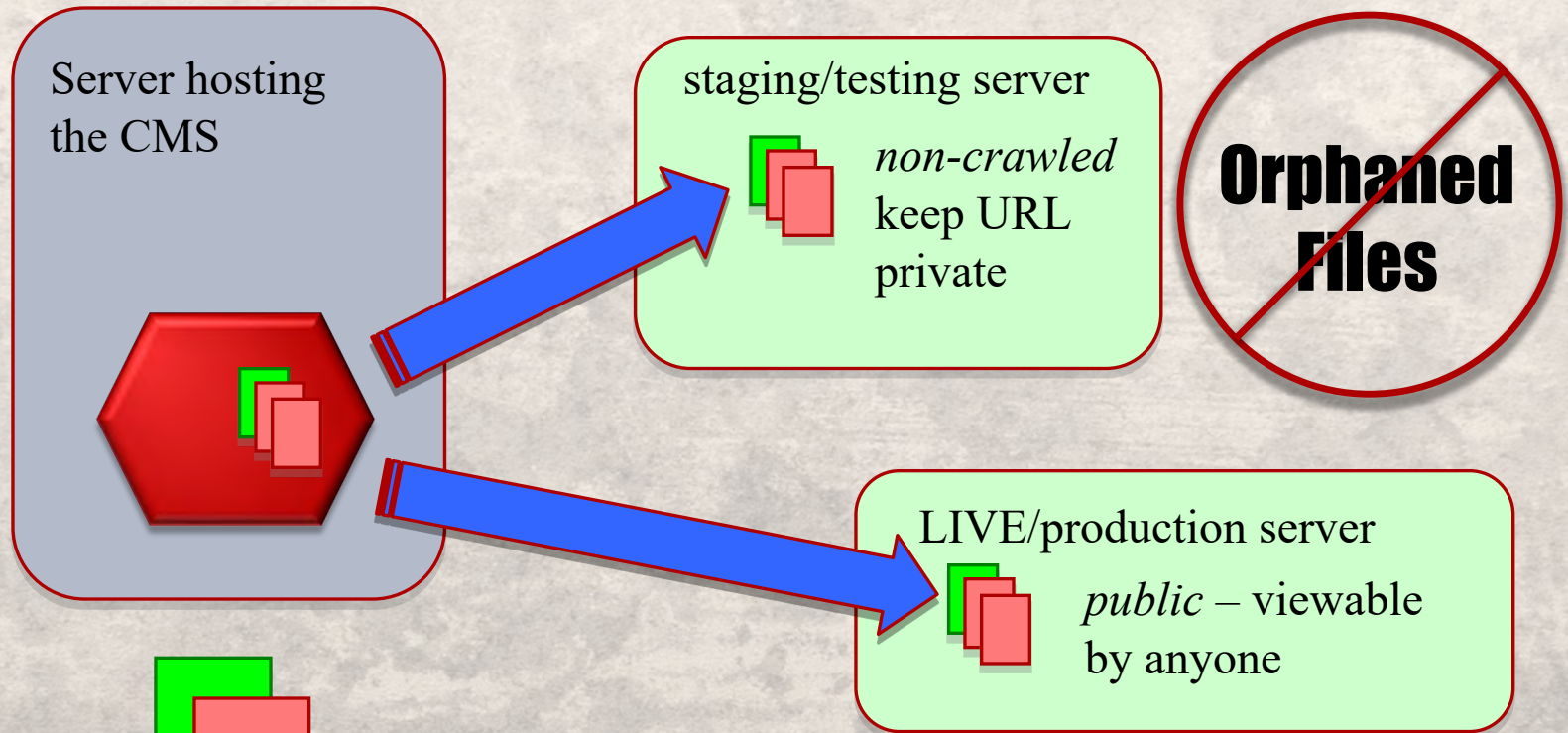
CMS TERMINOLOGY



CMS:

Orphan files = an item previously Published out to the server for which the CMS cannot find a current match - and thus, cannot erase or overwrite it. This can happen when Deleting, Moving, or Renaming without 'Un-publishing'.

CMS TERMINOLOGY

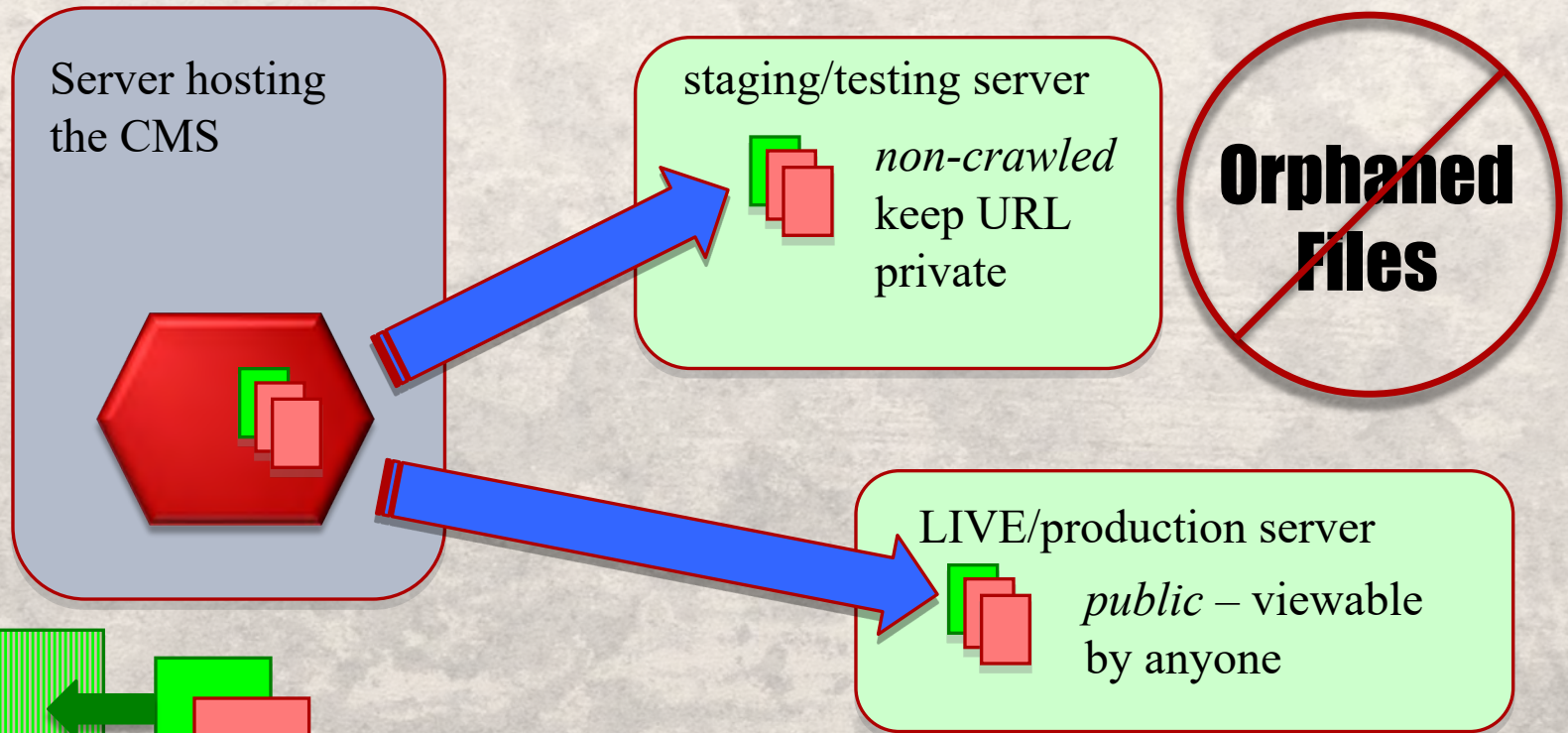


CMS:
only you
can prevent
Orphaned files

SO REMEMBER –

- when Deleting, Moving, or Renaming > Un-publish. Cascade should automatically do that for you when you take those actions! (but it can be good to double-check) Then remember: you need to republish anything which needs to replace the changed materials.

CMS TERMINOLOGY

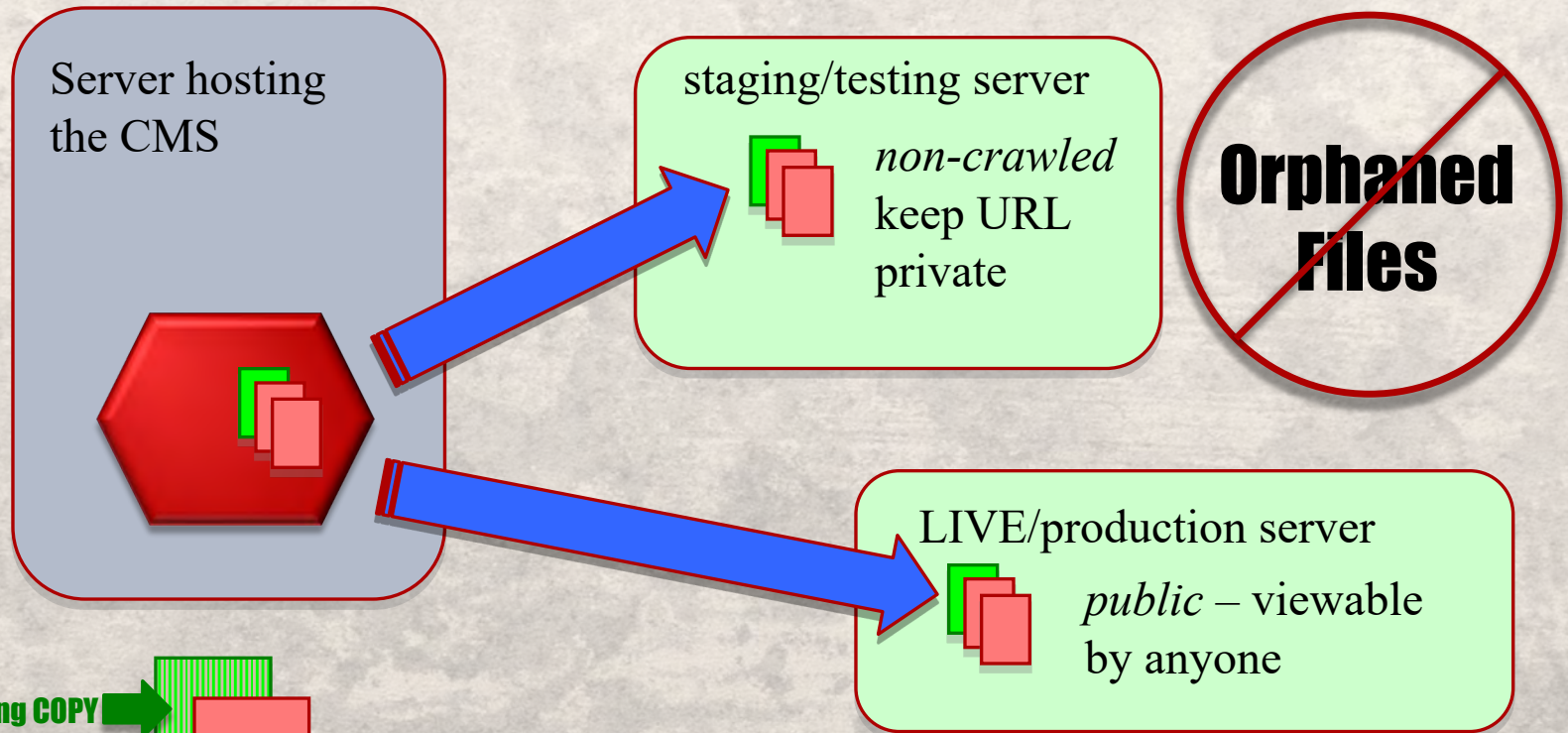


CMS:
only you
can prevent
Orphaned files

ALSO REMEMBER –

- When Moving or Renaming materials you temporarily wish to *retain*, remember that *Copies can be made and used for managed Unpublishing, then deleted later without adverse impact*, as the Server only cares about matching filenames and site structure, not dynamic CMS relationships.

CMS TERMINOLOGY



UN-PUBLISH using COPY

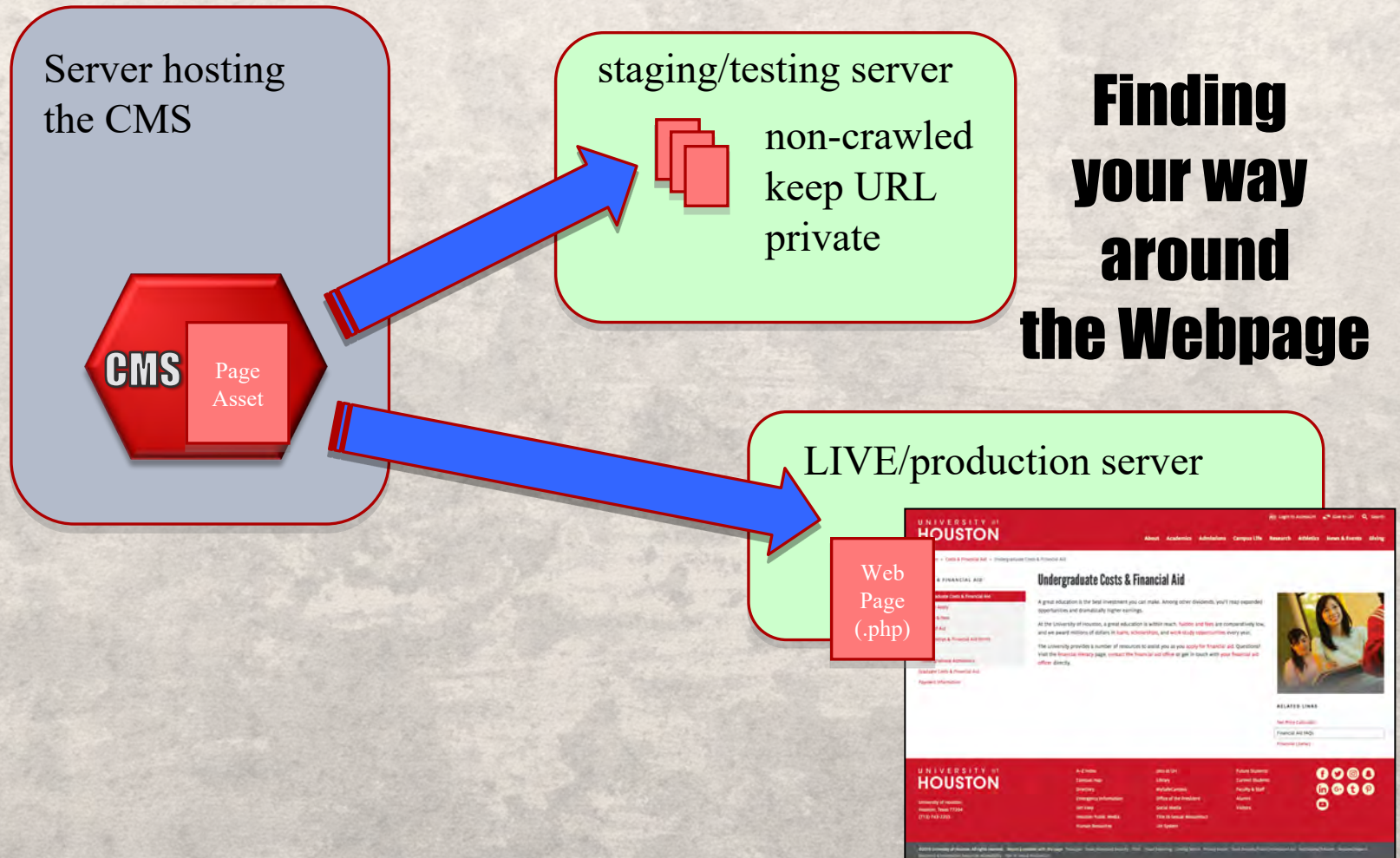
CMS:
only you
can prevent
Orphaned files

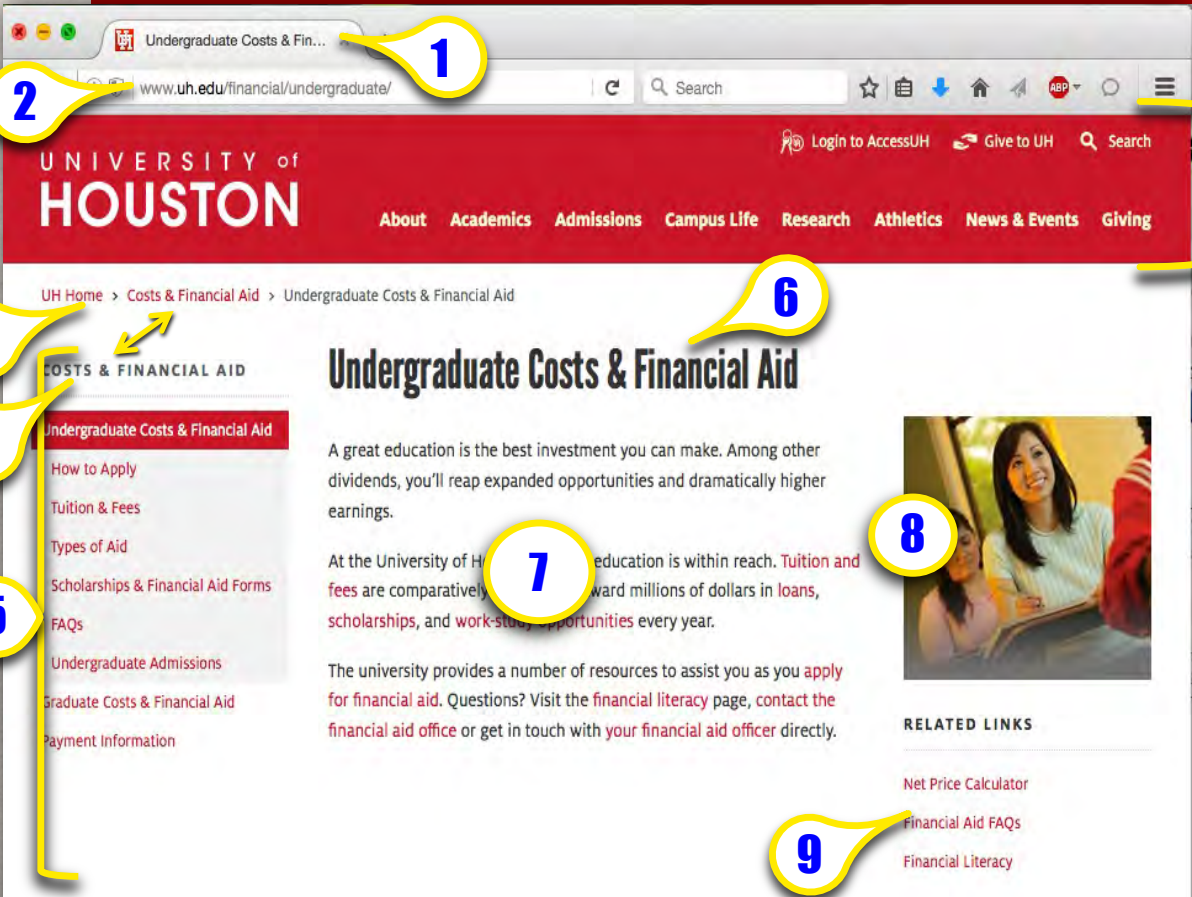
PUBLISH
NEW
Mat'ls

ALSO REMEMBER –

- When Moving or Renaming materials you temporarily wish to *retain*, remember that *Copies can be made and used for managed Unpublishing, then deleted later without adverse impact*, as the Server only cares about matching filenames and site structure, not dynamic CMS relationships.

CMS TERMINOLOGY





UH Header

- ① Browser Window Title
- ② Web Address (URL)
- ③ Breadcrumb
- ④ Site/Area Name
- ⑤ Left Nav Menu – left column
- ⑥ Display Name
- ⑦ Main Content Area
- ⑧ A Background Image
- ⑨ Related Links – right column

[Link to the UIT CMS page: How Do I Edit That?](#)



UH Footer

MAGICAL ILLUSIONS: The CMS uses Browser Tricks

- **Web designers** work hard to create seamless visual illusions – so that site visitors can focus on the content, and not just on figuring out the interface.
- **Browsers** provide some of the sleight of hand. When you go to a new page, they only “redraw” those things which change, or are new – so things appear to load faster. One side effect can be an illusion of animation: some things look like they are static while others change; thus, we perceive action, motion.
- **So, when the CMS Web-Page Factory** builds your pages, it already has plans to take advantage of that sleight of hand.

What you need to know to perform magical left-nav menu tricks:

- 1. A lot of the magic is already built in to the CMS!**

CMS Magic

MAGICAL ILLUSIONS:

What you need to know to perform magic menu tricks:

2. You do not have to specifically instruct the CMS to build a Left-Nav Menu.

Which is why this can be such a great feature!

But it also means you may not pay much attention to it, either, and so it is important to be aware of what is happening

so you will know how to keep your live site well **synchronized** with its CMS source!

3. The left-nav menu does not exist or function separately from the page on which it displays – each page has one, of its very own.

Each menu-eligible page has a left-nav menu built into it.

When a new page is created, the CMS automatically and dynamically includes an appropriate left-nav menu for it based on the page's position within the structure of your site.

CMS Magic

MAGICAL ILLUSIONS:

What you need to know to perform magic menu tricks:

4. Inside the CMS, pages' left-nav menus stay dynamic – so *they may change* if you change the site structure.

As long as a page asset's "indexing" is active, this CMS feature is active: pulling in whatever site-structure information (or changes) which may affect the left-nav menu.

Upon Publishing, the CMS captures whatever the current information may be at that point in time, and writes a **Static** file to the Server.

5. Changes may affect more than the item(s) you are currently editing.

Especially within a section: All the Pages within a section, including the main page, share much of the the same dynamic information for their menus. This makes it easy for site visitors to get back to any page of a section after visiting another page. It also means you will need to remember to publish ALL affected items, not necessarily just the page you updated, to keep your live site Synchronized with the CMS.

CMS Magic

MAGICAL ILLUSIONS:

What you need to know to perform magic menu tricks:

6. So what determines a Left-Nav Menu's actual contents?

INHERITANCE —

The CMS uses a specific algorithm to build the left-nav menu – based largely on ‘*inheritance*’ or parent:child relationships amongst the Folders and their Pages.

A Folder containing other items is considered the “parent” for those items – and by the same token, the contained items are considered that folder’s “child” items.

Inheritance is relative: Child Folders might also be considered Parent Folders if they contain Child items, and so forth.

FOLDER TITLE TEXT and other settings —

The text itself which appears in the Left Nav Menu (as well as the Breadcrumb) is drawn from each included Page’s immediate Parent Folder.

See under: ***Edit > System > Inline Metadata > Title*** to review or change the Left-Nav or breadcrumb text for any Folder containing an active Page.

“Display in Menu” & “Include when Indexing” also need to be selected.

CMS Magic

MAGICAL ILLUSIONS:

What you need to know to perform this magic menu trick:

7. Whenever the CMS builds a standard page's Navigation Menu – it will include, by design and by default, *all of* the following items:

- **the page itself** and each of the page's peers;
- **any 'child' item(s)** immediately subordinate to the page on display.
(i.e. no 'grand-children' will appear);
- **the parent page** of the page on display;
(note: if the page is a top-level item, this would be area's home page/folder, and thus item 4, Site name - from the earlier page-items diagram)
- **each of that parent's peers**, if any;
- **each of that parent's ancestors and each of those peers.**

UH styles will highlight each level differently, to distinguish them visually.

CMS Magic

MAGICAL ILLUSIONS:

What you need to know to perform magic menu tricks:

8. So when your site visitors click around from item to item . . .

- Basically, they will see left-nav menus which offer links to whatever relevant relatives any particular selected page may have.
- Those pages' related menu items may seem to magically “appear” or “disappear” as site visitors select various pages and new child items “magically appear” to replace the children of previously selected pages. A sort of flip-book animation results.

Want to Try It ?

- Go to the UH website and navigate around using the left-nav menus.
- Look for left nav menus which show descendants and ancestors, such as:
<https://www.uh.edu/nsm/biology-biochemistry/graduate/>

CMS Magic

Learn More:

Visit the staging-published version of the training materials (*off-campus requires VPN*):

Links on the home page lead you to CMS features examples and resource downloads.

<https://staging.web.e.uh.edu/cms-trainee-00/>.

Web Tech Cascade CMS team pages:

Cascade How-to's, Training & General info, Glossary, concept discussions; more ...

<https://www.uh.edu/infotech/services/web-services/cms/cms-how-tos/>

UH Web Marketing Resources:

Cascade, UH Bootstrap, Google Analytics, Forms, UH Web community, Downloads, More...

<https://www.uh.edu/marcom/resources/>

Guidelines for Custom Headers, Landing pages; recommended image sizes/specs:

<https://www.uh.edu/marcom/resources/cascade/>

UH Web Best Practices:

<https://www.uh.edu/marcom/guidelines-policies/web-best-practices/>

Meet the Web Marketing Team:

<https://www.uh.edu/marcom/team/index.php> – see:

Online Marketing and User Experience team

Contact: webmarketing@uh.edu

Note: Web Marketing is the business owner of the Cascade CMS at UH/UHS.

UH Communications/Web / Standards and Branding / Guidelines and Policies:

UH Branding: <https://www.uh.edu/marcom/departments/branding/>

UH Communications Guidelines and Policies: <https://www.uh.edu/marcom/guidelines-policies/>

UH Web Style Guide: <https://www.uh.edu/marcom/guidelines-policies/web-style/>

Cascade CMS at UH
