

This training will address the following topics:

Overview: CMS at UH; Permissions-based access

Intro to Content Management System(s); system requirements

- **Accessing & getting around the CMS**
(Getting Started – training credentials provided in session)
 - CMS Login: <https://cms.uh.edu/>
 - CMS Basics sample published pages:
<https://staging.web.e.uh.edu/cms-trainee-00/>
(includes a CMS Basics Handout PDF download link – scroll down left column)
- **Training Objectives/Goals: Familiarity with the Cascade CMS interface & jargon;**
 - *Overview:* User features/Settings/Views/*responsive interface(s)*; Walk-throughs for common User tasks; Introduce UH CMS/Web best practices in context; Identify resources, support, how to learn more (*also read further in this handout*)
 - *Asset Tree vs. Information panels vs. Edit* for each basic asset (Folder, Page, File)
 - Draft, Save & Preview, Submit >> CMS (*dynamic*) vs. Publish >> Server (*static*)
 - Using "unpublish" when *Deleting, Moving, or Renaming* items within the CMS
 - Content areas and options vs. various Page-type's layout options (Details >>)
- **Creating and Editing materials within the CMS:**
drafts, versions, previewing, editing (WYSIWYG/HTML); publishing/unpublishing
 - Creating: *Add Content* menu vs *Copying* (copies are assigned unique CMS IDs)
 - Uploading Files to the CMS: *e.g. graphics, PDFs, Excel, PPT, scripts, .zip, etc.*
 - *System-names* using descriptive words, all lower case, separated by dashes, no spaces, avoiding underscores – *building URLs from Folders' system-names, and system path; using the built-in CMS system name filtering tools*
 - Editing content; Editing views/panels; *How Cascade dynamically uses Metadata*
 - Working with Text (formatting), Images, & other Files
 - Creating and managing Links: "Internal" vs. "External" hyper-links
 - Internal linking tools/Choosers/dialogs; navigating to/placing Files/Assets
 - WYSIWYG editor's embedded HTML editor *and HTML (etc.) resources*
 - Common page options:
 - *Related Links sets* (should support user-interest, not site navigation!)
 - *Edit >> Settings section / Layout preferences and options*
 - Appending custom Stylesheets (CSS);
 - Appending custom Javascripts (JS);
 - Standard/Wide layout-column options
 - Redirect page (*allows a remote item to be included in local left-nav menu; or can send site visitors to location of your choice*)
 - (*Optional / custom News and Events set up; not all sites have this set up*)
- **Previewing, Editing, and Publishing/Unpublishing pages from the CMS**
 - Page preview includes UH styles/scripts; WYSIWYG Editor does not;
 - **Best practice: 1) CMS/Editing > 2) Staging/Testing > 3) LIVE/Production**
 - **Staging/Testing URLs** – do not share with general public – because they represent your site's "hidden" non-crawled server area(s) – *so you can catch errors BEFORE your pages are publicly available & searchable from the live server!*
 - **Publishing Destinations** - where the CMS writes files to = "your site" on server.
 - **Using "unpublish"** before Deleting, Moving or Renaming pages inside CMS; the CMS only changes a LIVE page by overwriting it or deleting it, and if it can't find the file then an outdated ("orphaned") version can be left on the server.
- **Respect the use of common-access assets** – eschew unilateral editing, *s'il vous plaît*
- **Stay within UH styles/guidelines** – review *UH Branding* and *Best Practices for the Web*

And above all - Welcome to the CMS !

Some notes about training and CMS access

CMS training can be taken at any time during the scope of a site development process or life cycle – e.g. before migration into the CMS has begun, during, or even after a site has been long established. The CMS Basics training may also be taken as a refresher by individuals who are already established Users.

There are a handful of basic, standard templates as far as the structure, look, and feel of each site – chosen according to the needs of the area, and based within UH Graphic/Web standards. Each area may also have its own unique combination of elements, which may not be covered in this training. Either *Web Marketing* or *Web Technologies/Web Services* will be available to answer questions about any built-in feature of your CMS-based site, and will be here to help you get all the pieces working for you. If you have questions, we will do our best to get you an answer that helps get you where you need to go.

Note: *Web Marketing* and *Web Technologies/Web Services* do not support custom implementations of CSS or JS, etc. However, such implementations may still be allowed in the CMS if they fall within UH guidelines and web best practices. *See Resources, following for more information.*

When you have successfully completed training in the CMS basics (e.g. today's training session) you will be **eligible** for access to the CMS.

To be granted access to the UH Website CMS:

- **CMS User Setup Information:**
 1. **Your PeopleSoft ID** - so we can distinguish you from others at UH who may have similar names, and we can be sure we have the correct Cougarnet ID to set you up as a CMS User.
 2. **What Site[s] you will be editing** – and/or what specific areas of those sites you may need access to – i.e. the Scope of Access desired – e.g. “entire CLASS site”, “Chemistry Dept pages in NSM”, etc. “Dept of Mathematics only”, etc.
[exact URLs or existing CMS paths are helpful & recommended]
 3. **The Level of Permissions to be granted.** The most common levels are:
 - a. **Editing access Only**, without publishing privileges - often used for those who may not have the primary responsibility for maintaining the website; or who may be transient to the area (e.g. student workers);
 - b. **Editing access with Staging-Only Publishing privileges** – so user can publish material to the staging server for review and approval – but not publish to the live site;
 - c. **Editing Access with Full Publishing privileges;**
 - d. *Unique requirements within existing group, etc. If the permissions listed above do not seem to suit what you need, please contact Web Tech to discuss.*
- **Please also let us know the status of the site you will be working on**, e.g. whether it is not yet in the CMS; is new/under development in the CMS; and/or whether the site is currently LIVE to the public. If your site is live, send us the URL, please - it helps to clarify that we are addressing the correct webpages.
- **FINALLY: Either your CMS site manager, your employment supervisor, or yourself if you are the principal for your area, MUST REQUEST access.** This should be in the form of an email to make sure we have the needed information in electronic form, and to make it easier to keep track of the request.

All else being equal we should be able to set up your access within one business week of WebTech receiving all the necessary information; and once it is set up we will send confirmation. If, however, you have not received a confirmation email within that time, please contact us again, or email: webservices@uh.edu or cms@uh.edu

Web Technologies group contact information:

Robert Birkline: rbirklin@central.uh.edu ; Patty Schwerin, *trainer du jour*: pschwerin@uh.edu
Web Technologies group – UH - UIT - webservices@uh.edu <https://www.uh.edu/infotech/>

Note: Web Marketing is the business owner of the Cascade CMS at UH/UHS – see info, next page.

How to learn more – some important information and links:

Visit the staging-published version of the training materials:

Links on the home page will let you download the reference handout in PDF, and the Basics PPT

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

Web Tech 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-web-marketing>

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/>

=====

Hannon Hill site Cascade CMS resources

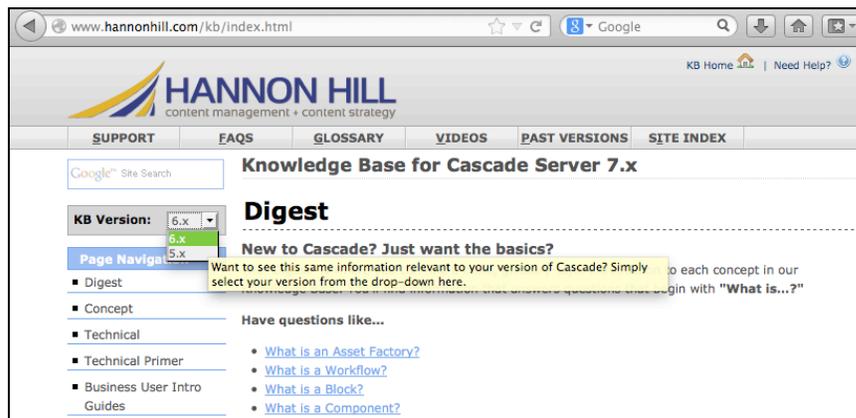
Note: as of 3/24/2017 UH upgraded from v.7.14 to v. 8.3; as of 10/11/2018 = v.8.9.1;

Hannon Hill version 8 "KB" (Knowledge Base) -

<https://www.hannonhill.com/cascadecms/latest/cascade-in-60-videos/index.html>

<https://www.hannonhill.com/cascadecms/latest/cascade-in-60-videos/account-settings.html>

NOTE: The older knowledge base area still retains valuable general information and discussions about the workings of Cascade. In addition, the latest release notes are listed under "Announcements".



Glossary: <https://www.hannonhill.com/cascadeserver/glossary.html>

The Rich-Text, aka "WYSIWYG" Editor:

<https://www.hannonhill.com/cascadeserver/WYSIWYG/index.html>

Assets: <https://www.hannonhill.com/cascadeserver/Assets/index.html>

Hannon Hill Cascade knowledge base: <https://www.hannonhill.com/cascadecms/latest/index.html>

RESOURCES

UH Images login: [The Download Zone](#)

<https://images.uh.edu/>

Login requires valid CougarNet credentials

UH Stock photos – search and download; graphic standards; eps vector icons; resources – UH Brand color swatch palettes, UH Brand font downloads, photo release form, Departmental UH Logos; intellectual property use permission form; sample layouts, materials, more...

LEARN MORE! WEB CODE/LANGUAGES REFERENCES

Login to AccessUH for access to [UH Lynda.com](#) training resources – *HTML, CSS, much more...*

<https://accessuh.uh.edu>

General on-line free references

<https://www.w3schools.com/>

https://www.w3schools.com/html/html_images.asp

https://www.w3schools.com/html/html_tables.asp

https://www.w3schools.com/html/html_links.asp

https://www.w3schools.com/html/html_urlencode.asp

<https://www.w3schools.com/xml/>

https://www.w3schools.com/xml/xsl_transformation.asp

WWW Standards / Usability References and Discussions

https://www.w3schools.com/html/html_accessibility.asp

https://www.w3schools.com/html/html5_semantic_elements.asp

<https://validator.w3.org/>

Other:

<https://www.webcredible.com/blog/improving-usability-screen-reader-users/>

"The World Wide Web Consortium (W3C) is an international community that develops open [standards](#) to ensure the long-term growth of the Web. ... "*

<http://www.w3.org/>

* <http://www.w3.org/tr/>

UH Cascade CMS Website Issues – Contact:

Web Technologies' Web Services group – UH - UIT - webservices@uh.edu or cms@uh.edu

Web Team – UH – MarCom - webmarketing@uh.edu

Send us feedback on the CMS training

– and/or on the UH Cascade Server CMS:

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

General UH Website – Report a problem:

<https://www.uh.edu/web-update/report-a-problem/>