Cascade Server: Contributors, Approvers, and Publishers
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The University Information Technology Services (UITS) IT Training & Education program at Indiana University offers instructor-led computing workshops and self-study training resources to the Indiana University community and beyond. We deliver training to more than 30,000 participants annually across all Indiana University campuses. Our staff is comprised of enthusiastic professionals who enjoy developing and teaching computing workshops. We appreciate your feedback and use it to improve our workshops and expand our offerings. We have received several international awards for our materials and they are being used at universities across the country. Please keep your questions, comments and suggestions coming!

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Welcome and Introduction

Welcome to *Cascade Server: Contributors, Approvers, and Publishers*. This workshop is intended to give those assuming the role of Contributor, Approver or Publisher an overview of how to get started in Cascade Server.

**What You Should Already Know**

You should have already attended *Web Publishing: An Overview of Tools and Resources* or have the equivalent skills. Specifically, you should be able to:

- navigate a web page
- use a word processor
- publish a web document

**What You Will Learn**

This workshop introduces anyone who will not have site manager access to the process of creating and managing content in Cascade Server and provides hands-on practice with how to:

- create content
- edit content
- use workflows
- publish content

**What You Will Need to Use These Materials**

To complete this workshop successfully, you will be provided with:

- a sample departmental web page created within Cascade Server
- the exercise files located in the CASCM folder: *seaturtle.docx* and *orcaevolution.docx*.
- a web browser
Getting Started

These materials presume you will begin work from the desktop, and have any required exercise files located in an epclass folder there. For instructions on obtaining the exercise files, see below.

If you need assistance logging on or starting an application, please consult your instructor.

Finding Help

If you have computer-related questions not answered in these materials, you can look for the answers in the UITS Knowledge Base, located at:

http://kb.iu.edu/

Self-Study Training

Want to learn more on your own?

IT Training Online makes self-study computer-based courses available on a wide range of IT topics. You may also purchase STEPS workshop materials to use in learning on your own. To find out more, go to:

http://ittraining.iu.edu/online/

Getting the Exercise Files

Most of our workshops use exercise files, listed at the bottom of page 1 of the materials. In our computer-equipped classrooms, these files are located in the epclass folder, which should already be on the computer desktop. If you are using our materials in a different location, you may obtain the exercise files from our Web site at:

http://ittraining.iu.edu/workshops/files/

Once you are logged on and have the needed files in an epclass folder on your desktop, you are ready to proceed with the rest of the workshop.
Today’s Project

Today, we will be assuming the role of a content manager for the Indiana University Department of Marine Biology in the Cascade Server environment. Throughout this workshop, we will be learning how to work within Cascade Server to create, edit, and publish data.

What Is Cascade Server?

Cascade Server is a Web Content Management System (WCMS) created by the Hannon Hill company. A WCMS is software that is used to create, edit, manage, and publish content to the web using a consistent and organized method. If you have used software like Drupal, Joomla, WordPress, MovableType, Blogger, Mambo, eZpublish, Dreamweaver, etc., you have used a WCMS. Using a WCMS allows the site manager, sometimes called a webmaster or web manager, to delegate the management of content to content experts regardless of their technical background. This allows the site manager to focus on the design and inner workings of the site while allowing content experts to contribute to and edit the content of the site.

Another benefit of using a WCMS to publish web content is the reuse of assets and content. Using Cascade Server, a single piece of content or a single asset can be used in multiple places. If a change is made to the content, the change is reflected everywhere the content is used. For example, if an image needs to be updated, the update can be seen everywhere the image is used.

One of the strengths of Cascade Server is that it allows multiple types of files to be created and published from a single piece of content. For example, if a web page has a section containing a list of undergraduate courses, that course list can be published as HTML, XML, RTF, PDF, or various other output types. In Cascade Server, content is created once but can be published in many different ways.

Understanding the Vocabulary of Cascade Server

Cascade Server, like every WCMS, has its own distinctive vocabulary. For individuals who have worked in other WCMS offerings, the vocabulary of Cascade Server will seem foreign and strange. Before we get started with the workshop, it is important to become familiar with the terms used throughout the publishing process in Cascade Server. This section is not intended to make you an expert in the terminology or even understand completely how all the parts and pieces fit together; it is offered as an introduction to the terminology.
Cascade Server Terminology

Below is a list of the terms most used while creating a site in Cascade Server. This list is present here to be used as a reference when you return to your work within Cascade Server:

- **Asset** - any entity within Cascade Server.
- **Asset Factory** - used to create every asset in Cascade Server. Asset Factories are similar in function to Microsoft Word templates.
- **File** - any asset in the system that is not created from other assets, such as images, sounds, CSS, and videos.
- **Block** - the basic building block of Cascade Server. Blocks can be placed within pages to generate content. Blocks are the smallest container for content in Cascade Server.
- **Page** - the main content container in Cascade Server. Pages are created from blocks and files and can be published in various formats such as web pages, PDFs, and XML documents.
- **External Link** - a symbolic link stored in Cascade Server to point to a specific URL outside of Cascade Server (e.g. http://www.google.com).
- **Folder** - a container to organize and store assets.
- **Lock** - a way to prevent editing of an asset by anyone but yourself.
- **Draft** - an unfinished document that’s been saved but not pushed into a workflow or published.
- **Workflow** - a process of approval a document must pass through before it is published.

Cascade Server User Roles

Cascade Server offers five roles that can be assigned to a user or group. The roles are Contributor, Approver, Publisher, Manager, and Administrator. We will be focusing on the first three today. Here’s how the role structure in Cascade Server works:

<table>
<thead>
<tr>
<th>Role</th>
<th>Capabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributor</td>
<td>The most basic role in Cascade Server. A Contributor can only add or edit (move, delete, copy) content to an already existing site.</td>
</tr>
<tr>
<td>Approver</td>
<td>This user can perform the same tasks as the Contributor, but they can also move a document in a workflow by approving or rejecting the content.</td>
</tr>
</tbody>
</table>
In today’s workshop, we will be starting at the top of this table as Contributors to create and edit some content. We will then be promoted to Approvers so we can see how to interact with a workflow. Finally, we will be made Publishers so we can work with the publishing aspects of Cascade Server.

Let’s take a brief tour of the Cascade Server Environment.

<table>
<thead>
<tr>
<th>Role</th>
<th>Capabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publisher</td>
<td>Users in this role can initiate the publishing and un-publishing processes for a page, asset, or entire site, bypass an assigned workflow, and revert documents to previous versions. In addition, has the same capabilities as the Approver role.</td>
</tr>
<tr>
<td>Manager</td>
<td>This role has many of the same rights as the Administrator; however, the rights are limited to an individual site. The manager cannot act on an asset that is not contained within his site unless she has been given access to that asset by either an Administrator or another Manager.</td>
</tr>
<tr>
<td>Administrator</td>
<td>This role has full, uninhibited access to any asset and system setting. This user can take any action (move, view, edit, create, publish, copy, delete) on any asset without restriction.</td>
</tr>
</tbody>
</table>

Logging In to Cascade Server

Cascade Server uses Indiana University’s Central Authentication System (CAS) to authenticate users to the system.

NOTE: If you are logged in with another user account using CAS, you will need to close all instances of your web browser and then navigate to the URL below.

1. To navigate to the Cascade Server training environment, in a web browser, type in the following address:

   http://author.wcms.iu.edu
2. To login, enter the username and passphrase provided by your instructor:

<table>
<thead>
<tr>
<th>Username</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Passphrase</td>
<td></td>
</tr>
</tbody>
</table>

When the login finishes, you are brought to the Cascade Server Dashboard.

NOTE: Upon logging in, you might see a message near the top center of the screen. This message is called a **Broadcast Message**. Broadcast messages are a way for administrators to communicate important information with all users in an instance of Cascade Server.

**Understanding the Dashboard**

The Dashboard in Cascade Server is a central location where you can see everything you have happening in Cascade Server.
The parts of the interface are:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu Bar</td>
<td>The blue bar that extends across the top of the web browser. This bar contains all the options for navigating Cascade Server and creating assets.</td>
</tr>
<tr>
<td>Cascade Server Menu</td>
<td>The swirl menu item on the far left side of the menu bar. This menu contains information about the instance of Cascade Server as a whole. This is also where you will navigate to the publisher and modify any of your user account options.</td>
</tr>
<tr>
<td>History</td>
<td>On the menu bar. This menu item allows you to quickly navigate from anywhere in Cascade Server to a location you have visited during your current session.</td>
</tr>
<tr>
<td>Search</td>
<td>The text box on the far right side of the menu bar. This is basic searching functionality used to locate assets.</td>
</tr>
<tr>
<td>Asset Tree</td>
<td>Left side of the screen under the menu bar. The Asset Tree is a list of all the assets you have access to in Cascade Server.</td>
</tr>
<tr>
<td>Quick Links</td>
<td>The Quick Links section at the top right of the screen brings up links that will take you to various places inside the WCMS quickly.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Main content area under the menu bar. The dashboard gives you an overview of everything you have active in Cascade Server at any time.</td>
</tr>
</tbody>
</table>

A Quick Note about This Workshop

The environment in Cascade Server used in this workshop has been created to allow you to become familiar with the Cascade Server application. It uses a workflow and a site structure that allows us to do this. We will be switching roles throughout the workshop to explore the functionality of each role. The
workflow used in the workshop has been tailored to allow us to complete the exercises contained within the workshop. By the nature of the application, each site in Cascade Server will be unique in its structure, but the principles taught in this workshop will be applicable to every site in the system.

**Becoming Familiar with Our Web Site**

Before we dive into the projects for today’s workshop, let’s take a moment to orient ourselves to the structure and functionality of today’s project.

As was mentioned earlier, we are assuming the role of a content provider for the Department of Marine Biology’s web site at Indiana University. There are a couple of functionalities that are crucial to the understanding of our projects.

**Navigating to the Index Page**

First, let’s take a look at the index page for our site. This page will be the initial landing point for anyone visiting our site.

1. To launch a new tab in your web browser, press:

   ![Ctrl] t

   **Note for Macintosh Users** - Throughout these materials, substitute ‹ for [Ctrl], as needed.

2. To navigate to the index page, in the address bar, type:

   http://mypage.iu.edu/~wcms###

   The index page is loaded in the web browser. The content we see here is completely generated using Cascade Server. From this page, we will be able to navigate to the Undergraduate Students, Graduate Students, Faculty, Press Releases, and Contact Us pages. We can also navigate to a PDF, Print Friendly, or XML configuration of this content.

3. To explore the page,

   ![Click] the various navigation links in the left side bar

4. To see the various output types,

   ![Click] any of the output links in the upper right of the page

Now that we’ve seen our page, let’s look at how it behaves within Cascade Server.
Using Cascade Server to Navigate a Site

Just like on the web, you can click page links to navigate around a site within Cascade Server. Let’s return to Cascade Server and see this in action.

1. Return to the Cascade Server tab in your web browser.

2. To navigate to the index page, in the Asset Tree,

   - Click WRAP_ITTE,  
   - Click IU-ITTE-WCMS###,  
   - Click CASCM,  
   - Click index

NOTE: Everywhere you see ### in these materials, replace ### with your three-digit WCMS account number.

You should see the following in the main content area:
The parts of the interface we see are consistent regardless of what asset we are viewing.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Path</td>
<td>This is the path within Cascade Server that will lead you to the currently selected asset.</td>
</tr>
<tr>
<td>Tabs</td>
<td>These tabs control what tasks you can perform on an asset: viewing, editing, moving, publishing, etc.</td>
</tr>
<tr>
<td>Panes</td>
<td>The panes divide the tabs into one or more sub-groups of information. For example, on the View tab for a page, we can see the Layout, a Preview, the page’s Properties, the Lock settings, and the Configurations.</td>
</tr>
<tr>
<td>Output Types</td>
<td>The outputs section lists what kinds of data are output when this asset is published.</td>
</tr>
<tr>
<td>Content Render</td>
<td>This is where you see the preview of the page or the form to edit the data on the page.</td>
</tr>
<tr>
<td>Help</td>
<td>The Learn More link takes you directly to the Hannon Hill Knowledge Base.</td>
</tr>
</tbody>
</table>

Take a moment and explore some of the other pages of the site.

3. To explore the other pages,

    ![Click](image)

    **the Undergraduate Students, Graduate Students, Faculty, and Press Releases links**

NOTE: Because of the way in which the Contact Us link is generated (manually, not dynamically) it is not functional inside Cascade Server.

As you can see, the information on all these pages is “dummy” information designed to take up space and demonstrate how the real data would be displayed.

The last piece of the site that is important to understand is how the Press Releases portion of the site works.
4. To navigate to the Press Releases page, in the Asset Tree,

![Click](the releases page)

You will see the press releases index page:

This page lists all of the press releases inside the press_releases folder. This list is created by an asset called an Index Block. Index Blocks are assets that make lists of assets within our site. Our main navigation is also generated by an Index Block. This allows any page that we create either in our site’s base folder or the press_releases folder to automatically show up in our navigation.

Let’s take a look at the contents of the press_releases folder.
5. To see these press releases, in the Asset Tree,

![Click](press_releases)

NOTE: Clicking the [+] next to any folder name will expand the folder so we can see its contents without selecting the folder. Clicking on the name of the folder will select the folder asset.

In the Asset Tree, you should see:

- WRAP_ITTE
- IU-ITTE-WCMS031
- CASCM
  - files
  - press_releases
    - biofuel
    - intest-health-salmon
    - lkek
    - snail-human
  - contact
  - faculty
  - gradstudents
  - index
  - releases
  - undergrad

Notice that the pages inside the press_releases folder correspond with the links on the releases page. Let’s look into how to create content in Cascade Server by creating a series of press releases.

### Creating Content

Creating content in Cascade Server can be done a few different ways. The first way we will explore is using an Asset Factory. An asset factory is analogous to a wizard, allowing users to create a specific type of asset. Asset Factories work by copying an existing asset (the base asset) and allowing the content to be edited and saved in a different location. This allows us to create many different instances of the same type of asset, for instance our Press Releases.

We will be using a press release asset factory to create a press release and move it along the chain in our workflow to an approver.
1. To create a press release, in the Menu bar, 

- Click New, - Point WRAP ITTE,

- Point IU-ITTE-WCMS###, - Point CASCM,

- Click Press Release

We see a sample press release form show up in the main part of the interface:
Exploring the Panes

Notice that there is a tab at the top of the editor. The only tab we see is Create since we are creating a press release. Directly below the Create tab, we see four panes. These panes control various aspects of the asset we are creating:

- **Content** - the main content of the page.
- **Metadata** - metadata (additional information used for categorization and description of an asset) related to the creation of an asset.
- **System** - information related to how the asset is stored, named, etc. in the Cascade Server environment.
- **Configurations** - allows us to decide what assets are assigned to which regions of a page. It also allows us to determine which regions are displayed in the current asset.

Let’s explore the tabs to see what kind of information is available.

1. To view the metadata,

   ![Click the Metadata pane]

   As you can see, this is where we can add keywords, a description, and a date range to indicate availability of this page:

   ![Metadata pane]

   The information on this tab is, in most cases, optional when editing a page. A site manager can make some of the information on this tab required.
The site manager can also move the fields from this pane to the Content pane to make it easier to find. When the metadata is moved to the Content pane, it is called **Inline Metadata**. We’ve already seen Inline Metadata in today’s project:

Let’s look at the System pane next.

2. To view the System information,

   ![Click the System pane](image)

As you can see on this pane, we have items that relate to the construction of this page, namely the **Parent Folder**, **Configuration Set**, **Metadata Set**, etc.:

The important field on this pane is the Parent Folder. The Parent Folder determines where the asset is to be saved. In our asset factory, we don’t have control over this option.

The System pane also allows you to control whether the page is published or indexed, and whether hyperlinks in the page will be relative links or absolute links.
3. To view the Configurations information,

```
Click the Configurations pane
```

This tab contains all the **configurations** and **regions** on those configurations:

The configurations are basically different file types that are published when the page gets pushed to a server. For our page, we will see an HTML, PDF, Printer Friendly, and XML format when we publish a document. We know this because under the pane navigation, we see a Configurations section with all of these configurations listed:

A region is an area designated in a configuration’s template to hold a chunk of data. For example, the top region on our pages is the BRANDING_BAR region:

If we needed to change the branding bar from the Bloomington campus’ bar to the IUPUI campus’ bar, we would do that here on the Configurations pane.
Let’s take some time to fill out the content portion of the press release before we submit our document.

**Adding Content to the Asset Factory**

The asset factory we are using to create this press release allows us to enter data in text boxes. The data we enter is then transformed into a web page when the item is published. It may seem that we are entering redundant information, but we are, in fact, filling out the metadata for the page (HTML title, keywords, etc.) before we fill out the information that will actually be displayed on the web. For example, the uppermost title field is the HTML title - the text that will show up in the title bar of a web browser - while the lower title field is the content that will be displayed in the body of the web page. The other quasi-duplicated field is display name. Display name is used when the asset is referred to by name in Cascade Server, for example for a hyperlink. Our Press Releases page is using the display name of the page asset as the clickable text for the hyperlinks.

NOTE: Metadata is extra information stored in the header of a web page. It is not visible in the web browser, but it is used by search engines to determine the content of the page.

Let’s fill in the top few text boxes, then import some text from our Word document.

1. To complete the top section of the press release, fill out the fields according to the table below (if the field isn’t listed, leave the default value):

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Sea Turtle Anatomy</td>
</tr>
<tr>
<td>Title</td>
<td>Sea Turtle Anatomy</td>
</tr>
<tr>
<td>Summary</td>
<td>This is a press release announcing some new discoveries about sea turtle anatomy.</td>
</tr>
<tr>
<td>Author</td>
<td>Your Name</td>
</tr>
<tr>
<td>State</td>
<td>Indiana</td>
</tr>
<tr>
<td>Date</td>
<td>Today’s Date</td>
</tr>
<tr>
<td>Body Title</td>
<td>Sea Turtle Anatomy</td>
</tr>
</tbody>
</table>
Launching Microsoft Word

Let's open a Microsoft Word document and copy and paste the information for the content of our press release.

1. Launch Microsoft Word from the Start Menu or another shortcut.

2. To open a file, press:

   ![Ctrl](image)

   You see the Open dialog box.

   We need to specify the name and location of the file to open.

Setting the Location for Opening Your File

When the dialog box opens, it lists a default location from where the file will be opened. All of our exercise files are contained in the epclass folder, located on the desktop. We'll want to change our location to this folder.

We will start at the desktop, since our exercise file folder, epclass, is located there.

1. To move to the desktop,

   ![Click](image)

   The current location is now set to the desktop. All of our exercise files are contained in the epclass folder, located on the desktop.

2. To open the epclass folder,

   ![Double_click](image)

   The epclass folder contents are now visible.

   *Note for Macintosh Users* - On a Macintosh, the “From:” field is above the list of visible folders and files. To move to the desktop, press the key combination `⌘ + D`. From there, you can move into the epclass folder.

   We will need to open the CASCAM subfolder of the epclass folder that contains all of the necessary documents.
3. To open the correct folder,

- Double Click the CASCM folder

4. To open the file,

- Double Click seaturtle.docx

We will be using the information in this document to fill in the content section of our press release.

**Copying Content from Microsoft Word**

While we are in Word, let’s copy the text of the document, excluding the title, and return to Cascade Server.

1. To select the content,

- Press & Drag everything but the document’s header,

- Press: Ctrl C

2. Return to Cascade Server

**Pasting Text from Microsoft Word**

Text copied from Microsoft Word can either be pasted directly into the WYSIWYG (What You See is What You Get) editor, maintaining all the formatting from the Word document, or it can be added using the Paste as Plain Text option, removing all formatting contained in the Word document.

We will be using the Paste as Plain Text option today. Typically, it is a good idea to use the Paste as Plain Text functionality just to ensure that the text is all that gets copied. It also allows the text to be formatted by the style rules already contained within the web site.

1. To select all the text in the WYSIWYG editor and remove it,
2. To use the Paste as Plain Text option, in the Content editor,

![Click](image)

The **Paste as Plain Text** dialog box appears:

![Dialog Box](image)

The first time you use the Paste as Plain Text option, you will see this warning. To paste, we will just press **Ctrl** + v and the Paste as Plain Text option will be turned off.

3. To acknowledge the warning and continue,

![Click](image) ![Ok](image)

4. To paste in our text and continue, press:

![Ctrl](image) ![v](image)

Our text is added to the Content section. We will leave the About section with the default text. We are ready to submit our press release.

5. To save the press release, at the bottom of the page,

![Click](image) ![Submit](image)

When we click Submit, since the folder is workflow controlled, we will be brought to the Start Workflow screen. From here, we can add comments about the document we are creating before pushing it into a workflow.

**NOTE:** Unlike some WCMS programs, Cascade Server’s Submit button works for the entire page. The Submit button only needs to be clicked when an asset is ready to be saved or put into a workflow, not after finishing work on each pane. Clicking the Submit button will create the asset and, in our case today, initiate a workflow. Once a document
is locked in a workflow, it cannot be directly edited until the workflow is finished. It can, however, be moved into an edit step that would allow editing.

When we submit our document, we see the Start Workflow page:

This page allows us to name our workflow, add comments about the document, and select a due date. It also shows us all the steps the document is required to pass through before the workflow is completed.

We will add some comments now so we can see where the comments are stored later.

6. To name the workflow, in the Workflow Name field,

   ![Press & Drag](the existing name, type: wcms### Sea Turtle Anatomy)

7. To add a comment, in the Comments field, type:

   Breaking news about sea turtle anatomy.

8. To start the workflow and continue working,

   ![Click](Submit)

The workflow is initiated.

**Becoming Familiar with Cascade Server Project 1: Creating More Press Releases**

We will create an additional press release next.
1. Create another press release, following the steps in the previous sections, using the file `orcaevolution.docx`.

NOTE: Feel free to explore the functionality of the WYSIWYG editor while you are creating this press release.

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Editing Content in Cascade Server

Now that we’ve created content, let’s take a look at editing. We will be editing the Faculty page to correct some errors we’ve noticed.

1. To select the Faculty page, in the Asset Tree,

   ![Click WRAP_ITTE, Click IU-ITTE-WCMS###, Click CASCM, Click faculty](image)

   We see the Faculty page preview:

   ![Faculty page preview](image)

   Before we can make changes, we have to switch from the View tab to the Edit tab. Let’s edit the page now.
2. To edit the page,

Our faculty member, Doug Gul, has brought it to our attention that we have left out one of his Bachelor degrees and that the address of his office is incorrect. Doug also received a B.S. in Genetics from the University of Florida and his office is located at 1324 5th St., not 1234 5th St., a common typographical error.

Let’s first add Education Information.

Our education information is stored in a repeating data structure:

![Education Listing](image)

Under the header for each listed degree, you see a structure similar to this:

![Structure](image)

This is used to add [+], remove [-], or re-arrange the listed item. We will be adding a Bachelor degree from the University of Florida. We will add it after the B.S. in Microbiology.

3. To add Education Information, in the first Education Information box,

![Click](image)

We’ve added some blank Education Information below the first, but above the second, degree.

4. To add the content, fill in the fields according to the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Name</td>
<td>University of Florida</td>
</tr>
</tbody>
</table>
5. To change the street address, scroll down on the page, and, in the Street field, type:

1324 5th St.

We’re done, so let’s go ahead and submit the changes.

6. To submit the changes,

![Click](Submit)

We are brought to the workflow page again. Let’s add a description of the changes and initiate the workflow.

7. To name the workflow, in the Workflow Name field,

![Press & Drag](the current value, type: wcms### Faculty)

8. To describe the changes we made, in the Comments field, type:

Per Doug’s request, we added a B.S. in Genetics and edited his address. Everything should be accurate now.

9. To start the workflow,

![Click](Submit)

Now that we’ve created some content as well as changed some content, we’ll take a look at the Approver role in the system.

### Editing a Document Locked in a Workflow

There are three types of steps associated with a workflow: **transition**, **edit**, and **system**. A transition step simply allows for movement from one step to another for review. An edit step allows for that movement and provides a chance to edit a document. A system step allows Cascade Server to perform an action on behalf of the user, for instance, publishing or sending a message.
When a document is in a workflow, it is locked from being edited until it is at an edit step. This means that once the document is submitted, you have to wait for an edit step before it can be edited. Cascade Server will allow you to go through all the motions of editing until you click the Submit button.

Approved Content

At this point in the workshop, we will be switching roles. Before, we were just content contributors. We were able to create content and pass it off to an approver for review. We will now be taking on the role of that approver to explore some of the capabilities of the Cascade Server system.

NOTE: The instructor will now change your role in the system from contributor to approver.

1. To refresh your view in the system, after your instructor changes your role,

   ![Click Home]

   You won’t see a visual change in the interface; however, your role has changed to approver within Cascade Server. If you click on one of your workflows now, you should be able to assign it to yourself and take action. Let’s see this in action.

Approving a Document in a Workflow

To begin, we’ll look at one of our press release workflows.
1. To view the workflows assigned to your group,

Click the Workflows tab

There are two sections to this page, Personal Workflows and Group Assigned Workflows Waiting:

<table>
<thead>
<tr>
<th>Workflows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
</tr>
</tbody>
</table>

**Personal Workflows**

- wcms031 Faculty
- wcms031 Sea Turtle Anatomy
- wcms031 Orca Evolution

**Group Assigned Workflows Waiting**

NOTE: During the workshop, you will see several workflows listed under the Group Assigned Workflows Waiting section of this page. Those workflows are created by and for your fellow participants.

Personal Workflows are created or owned by you. Group Assigned Workflows Waiting are workflows assigned to one of the groups you are assigned to. You can take ownership and process any workflow in the Group Assigned Workflows Waiting section.

NOTE: Today’s workshop will be focusing on Personal Workflows. The wcms### accounts cannot write or edit within another user’s site.

2. To view the first press release workflow,

Click the Sea Turtle Anatomy press release workflow

At this point, we see the information about the workflow:
We see what stage the workflow is in, who it’s assigned to, where it goes next, when it was started and by whom, etc. At the top of the screen, we see that the workflow is waiting for ownership.

A group member cannot act on a workflow simply as a member of a group in Cascade Server. In order to work on a workflow, we have to assign it to an individual first. Currently, according to the Workflow Waiting for Ownership section, our workflow is assigned to the Approvers’ group.

3. To assign the workflow to yourself, in the section labeled Workflow Waiting for Ownership,

![Click Assign to Me]

The workflow is now assigned to our account; nobody else in the Approver group can take control and work on this document now. We can see two options at the bottom of the screen, Assign additional modifications to Contributor (Group) and Approve:

If we approve the document, it moves on to the next step of the process (Publisher Approval in Ordered Steps). If we assign additional modifications, it will be reassigned to the contributor group for other changes (Optional - Revise Content (Contributor) in Unordered Steps).

Before we take a look at the document itself, let’s take a look at the comments that have been left for us by the contributor.
4. To view the comments from the contributor,

Here we see two entries in the list:

The first entry shows that we initialized the workflow. The second step shows that we created a document. The difference between initializing and creating is minor. The initialize step shows that we started a workflow. The create step shows that we are using the workflow to follow a newly created document.

Let’s return to the Properties pane and view the content that’s been added.

5. To return to the Properties pane,

Let’s view this press release and see what content is included.
6. To view the press release, at the top of the page, in the Review Content section,

- **Click** sea-turtle-anatomy

Now we can see the press release as it would appear when it is published:

Here, we can review the content and see everything in the document.

Let’s return to the workflow and approve this release.

7. To return to the workflow, at the top of the page, under the panes, next to Workflow,
8. To approve the workflow,

![Click to approve]

We are taken again to the comments screen so we can attach some comments to the workflow.

9. To attach comments, type:

```
Document looks good to me.
```

10. To move the document to the next step of the workflow,

![Click to submit]

When you submit the document, you’ll notice that the green check mark moves from the Approver Review step to the Final Review step:

Let’s take a look at how to return a document to a previous step.

**Returning a Document to the Contributor**

Let’s choose the option to return the document to the contributors for the second press release.
1. To return Home, in the Menu bar, 

   ![Click Home]

2. To view the workflows assigned to your group,

   ![Click the Workflows tab]

3. To view the second press release workflow,

   ![Click the Orca Evolution press release workflow]

4. To assign the workflow to yourself, at the bottom of the group name, at the top of the screen,

   ![Click [Assign to Me]]

5. To view the press release, at the top of the page, in the Review Content section,

   ![Click orca-evolution]

   NOTE: If you named your document something other than orca_evolution, click that name instead.

   After reviewing the release, let’s return to the workflow page and reject this press release, sending it back to the contributor.

6. To return to the workflow, at the top of the page, next to Workflow,

   ![Click]

   At the bottom of this page, we will choose the option for Assign additional modifications to Contributor (Group).
7. To return the document to the contributor,

Assign additional modifications to the Contributor (Group):

We are brought again to the comments screen.

8. To add some comments, type:

   Needs more content. Current content is thin and uninteresting.

9. To move the document on to the next step of the workflow,

Our Orca Evolution page has been passed back to the contributor.

Reviewing Changes to an Existing Document

We also have a workflow in our queue for our Faculty page where we simply made a couple changes to a document that was already published. We will use this document to explore Cascade Server’s change tracking feature.

1. To return Home, in the Menu bar,

2. To view the workflows assigned to your group,

3. To view the faculty workflow,
4. To assign the workflow to yourself, at the bottom of the group name, at the top of the screen,

- **Click** [Assign to Me]

5. To view the page, at the top of the page, in the Review Content section,

- **Click** faculty

We now have another option at the top of our preview page:

<table>
<thead>
<tr>
<th>View</th>
<th>Edit</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Layout</td>
<td>Preview</td>
<td>Properties</td>
</tr>
<tr>
<td>Workflow</td>
<td>wcms031: Faculty</td>
<td></td>
</tr>
<tr>
<td>Viewing</td>
<td>Current</td>
<td>Working Copy</td>
</tr>
<tr>
<td>Outputs</td>
<td>HTML</td>
<td>PDF</td>
</tr>
</tbody>
</table>

The options shown here (Current, Working Copy, Compare with Current) indicate that there have been several versions of this document. By clicking these options, we can view different versions of the document. We can view the currently published page by clicking current. Working copy refers to the copy locked in the workflow. We can also compare the working copy of the document with the currently published document by clicking Compare with Current.

Let’s take a look at Cascade Server’s Compare with Current feature.

6. To compare the document with the current document,

- **Click** Compare with Current

Recall that we accessed this document previously when still in the Contributor role because the faculty member contacted us about some missing information in his profile. Also remember that the changes we made haven't been published to the live site, because we sent them to the workflow.
7. If necessary, scroll to see the entire page content

We can now see the additions in green highlight and the deletions in red highlight with a strike through:

condimentum ipsum. Vivamus id arcu vel nisi semper tincidunt. In tincidunt.

- University of Florida, B.S. Microbiology
- University of Florida, B.S. Genetics
- University of Southampton, M.S. Marine Biology
- University of California, Santa Barbara, PhD Marine Biology

NOTE: This functionality does not work in Internet Explorer 6 and earlier.

If we are satisfied with the changes to the document, let’s return to the workflow and approve the document.

8. To return to the workflow, at the top of the page, next to Workflow,

9. To approve the workflow,

We are taken again to the Comments screen so we can attach some comments to the workflow.
10. To add comments, in the Comments field, type:

   The changes look accurate. Good to be published.

11. To pass the workflow on to the publisher,

   ![Click](submit)

   Let’s explore the publisher role now.

### Publishing Content

The publisher role is the most complex role we will explore today. The publisher role allows the same actions as the contributor and approver, as well as the ability to publish content to a live site. The publisher can also take down content that has already been published.

At this point, we will simply be publishing content. We will look at how to take down content a little bit later.

**NOTE:** The instructor will now change your role in the system from an approver to a publisher.

1. To refresh your view in the system, after your instructor changes your role,

   ![Click](home)

   You won’t see a visual change in the interface; however, your role has changed to publisher within Cascade Server. Let’s explore the publisher’s capabilities.

### Editing Existing Pages

The publisher has the ability to view, change, and publish any document in the system. A publisher has the option to use or bypass a workflow when saving changes to an asset. A publisher cannot bypass a workflow already in progress. Let’s see how to control this.

We will be editing our contact page, changing the phone number of our office, then publishing the document. We will not be using the workflow review process on this document since it is a quick and important edit to the content.
1. To view the contact page, in the Asset Tree,

- Click WRAP_ITTE, - Click IU-ITTE-WCMS###,
- Click CASCM, - Click contact

The contact page appears:

2. To edit the page,

- Click the Edit tab

3. To change the phone number, scroll to the bottom of the page,

- Press & Drag the current value for Phone Number, type: 555-333-5561

Before we submit our changes, let’s take a look at how to start or bypass the workflow as a publisher.
4. To view the workflow options, scroll to the bottom of the page,

![Advanced Options]

You see:

From here, any user who can create content can check the document for spelling. The other options are grayed out for all users except for publishers and site managers. This means that Contributors and Approvers cannot modify these options. Publishers have the option to start the workflow or not. We don’t want to start the workflow so we will simply uncheck the checkbox for Start Workflow.

We will continue to bypass the workflow in this example.

5. To bypass the workflow,

Uncheck the Start Workflow checkbox

6. To submit the changes to the document,

![Submit]

We are returned to the document preview.

**Publishing a Document Manually**

While we have submitted the changes, *the page has not been published*. This means that the changes we have made are not visible on the live site. We have only made changes to this document within Cascade Server. The changes have only been stored within Cascade Server. Let’s publish the page to the live site.
1. To begin the publishing process,

![Click the Publish tab]

We are taken to a screen that gives us options as to what gets published. At the top of the screen are the destinations for the different document types that will be published (PDF, Print Friendly, XML, etc.). A destination is the representation of the file type(s) and location(s) in which the page will be published. For example, the destinations for our page look like this:

The first destination in the list, named WRAP_ITTE/IU-ITTE-WCMS###/Default, or simply Default, is the main destination. It will generate an XHTML page that looks similar to the pages we see in Cascade Server. The Print Friendly destination will create an XHTML document with no style or formatting, just content. The other two destinations, PDF and XML Destination, will output those file types.

We also see options to publish report messages and to publish or un-publish the document.

NOTE: The publishing structure in Cascade Server allows us to choose where we publish certain documents. For example, if, for some reason, we only need to publish a new PDF, we can select only the PDF destination. It is important to check with your site manager to figure out where each destination publishes (live server vs. test server) and what file type it will output (rss vs. podcast, php vs. cfm, etc.).

We will leave the default options as selected here.
2. To publish the page,

![Click] Submit

The page is placed in Cascade Server’s publishing queue.

**Understanding Publishing in Cascade Server**

Publishing in Cascade Server is handled by a queue. When a publish message is sent, the documents are placed into the system-wide publishing queue. When a page’s turn comes up in the queue, Cascade Server will push the content out to the selected servers. Since the publishing is handled in a queue, publishing is not instantaneous as in some WCMSes, rather, it happens after the publish message is sent.

NOTE: If you are interested in seeing where your publish job sits in the queue, you can open the Publisher’s active jobs. To do this, ![Click], ![Point] Publisher, ![Click] Active Jobs.

**Becoming Familiar with Cascade Server Project 2: Adding an Undergraduate Course**

Now that we understand how publishing works, let’s use the Publisher role to add an undergraduate course to our undergraduates page. Remember that our undergraduate’s page is a list of courses and their course web sites.

1. In Cascade Server,

   **Add a course entry for BIO C101 - Basic Crustacean Physiology with a web site of bioc101.html**

2. Bypass the workflow and publish the Undergraduate page.

**Creating Links to External Sites**

Cascade Server also provides a way to create a link to an external site as an internal asset so it can be indexed and included in navigation. The asset that does this is called an *External Link*. External Links are simple assets that contain only a name, parent folder, and URL for an external site.

We will create an external link to Indiana University’s home page to be included in our navigation.
1. To create an External Link, in the Menu bar, 

   ![Click New, Point Default, Click External Link]

You see the External Link asset factory:

2. To fill in the asset factory, use the table below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Name</td>
<td>Indiana University</td>
</tr>
<tr>
<td>Parent Folder</td>
<td>/WRAP_ITTE/IU-ITTE-WCMS###/CASCM</td>
</tr>
<tr>
<td>Link</td>
<td><a href="http://www.indiana.edu">http://www.indiana.edu</a></td>
</tr>
</tbody>
</table>

3. To save the asset, when you are finished,

   ![Uncheck the Start Workflow checkbox, Click Submit]

You will see the web site associated with http://www.indiana.edu rendered within Cascade Server. Let’s look at our index page to see how this affects our site.
4. To view our index page, in the Asset Tree,

You will see:

![Image of the index page with the Department of Marine Biology and Indiana University home page render in Cascade Server]

Notice that the Indiana University link is located above our Home link. This isn’t quite the best place for it, so let’s see what happens when we move it into our press_releases folder.

**Using Move/Rename**

At any time, you can move, copy, or rename any asset. Let’s explore how the Move/Rename tab works.

1. To activate our External Link, in the Asset Tree,

![Click Indiana University]

We see the Indiana University home page render in Cascade Server.
2. To Move/Rename the External Link,

You see:

![Move/Rename tab](image)

As you can see, you can change the System Name or the Parent Folder of the asset.

3. To begin selecting a new folder,

You see the Please choose a Folder dialog box:

![Folder selection](image)

4. To select the press_releases folder, in the asset tree within the Please choose a Folder dialog box,

You are returned to the Move/Rename window.
5. To finish Moving/Renaming the asset,

Uncheck the Start Workflow checkbox, —[Click]— Submit

The asset is moved to the press_releases folder. Let’s take a look at our Press Releases index page to see how it looks now.

6. To view the Press Releases page, in the asset tree,

You see:

This isn’t quite what we want either because the site itself is not a press release.

After some discussion with our supervisor, we determine that the link in the branding bar should be sufficient. We no longer need the Indiana University external link.
Deleting an Asset

Let’s delete the Indiana University link asset so it no longer appears in our site.

NOTE: We are using delete here as an example of how it works. To achieve this effect without deleting, edit the asset and, on its system pane, uncheck the Include While Indexing and Include When Publishing checkboxes. This way the asset is preserved in case we need to use it again in the future.

1. To select the Indiana University asset, in the Asset Tree,
   
   ![Click the press_releases folder, Click Indiana University]

2. To delete the asset,
   
   ![Click the Delete tab]

You see:

3. To delete the asset,
   
   ![Submit]

   The asset has been deleted.

Using the Recycle Bin

Cascade Server features a Recycle Bin feature. A deleted asset can now be retrieved using the Recycle Bin for fifteen days after deletion.

Let’s explore how this would work now.
1. To find the Recycle Bin,

   [Click] Home

2. To see the Recycle Bin’s contents, on the Dashboard,

   [Click] the Recycle Bin tab

You see a list of all the assets that have been deleted in the last fifteen days:

![Recycle Bin - Items I have deleted in the last 15 days](image)

NOTE: Your screen may not look exactly as this one does.

**Restoring a Deleted Asset**

Let’s explore how to restore an asset with our Indiana University external link.
1. To restore the Indiana University external link,

You see:

We won’t restore our link at this time, but if we wanted to, all we would have to do is [Click] [Cancel]. Let’s cancel the restoration.

2. To cancel the restoration,

You are returned to the Recycle Bin.

NOTE: Any user can use the Recycle Bin. We looked at the feature as a Publisher so we could bypass the workflow.

### Publishing a Document in a Workflow

The process to publish a document from a workflow will vary from workflow to workflow, but in our example, it is similar to approving a document’s content. We will return home and look at the workflows we have available to us.

1. To return Home, in the Menu bar,

2. To view the workflows assigned to your group,
3. To view the first press release workflow,

   ![Click](Image)
   wcms### Sea Turtle Anatomy

4. To assign the workflow to yourself, at the bottom of the group name, at the top of the screen,

   ![Click](Image) [Assign to Me]

   We can see here that we have three options, Reject to Contributor (Group), Reject to Approver (Group), and Approve. The two reject options will return the document to those places in the workflow. The Approve option will publish the page out to the live server.

5. To approve the workflow,

   ![Click](Image) Approve:

   We are taken again to the comments screen so we can attach some comments to the workflow.

6. To attach comments, in the Comments field, type:

   Great information, page published!

7. To finish the workflow and publish the document,

   ![Click](Image) Submit

   When we submit the page, we are taken directly to the publishing queue. At this point in today’s workflow, our document is published; however, what happens to a document in a workflow after a Publisher approves the document is at the whim of the Site Manager.

   We can return home to see if a publish message was generated.
8. To return to the Home screen, in the Menu Bar,

 viewing Messages

When a page is published in Cascade Server, or when a workflow is com-
pleted, you receive a message confirming the action. Let’s view our messages.

1. To view the current messages,

 Viewing the Published Content

Now that we have made changes, published, and edited content, let’s take a
look at the site.

1. To view the site we’ve edited, in the address bar of a web browser, navigate
to:

 http://mypage.iu.edu/~wcms###

You should see the site we’ve been working on with the changes and addi-
tions we’ve made. Explore the Press Releases, Contact Us, and Faculty
links to see the work we’ve done so far today.
Un-publishing an Asset

Let’s suppose that one of the press releases that we created today contains false information of some kind. Our department head has brought the false document to our attention and has requested that it be brought down immediately. Let’s take a look at how we remove a published asset from a live server.

1. In the Asset Tree, navigate to the press_releases folder in your site.

2. Select the *sea-turtle-anatomy press release* you added during the workshop.

Now that we have the page selected, let’s look at how to un-publish the content.

3. To begin un-publishing the page,

   - Click the Publish tab

4. To finish un-publishing the page,

   - Click the Un-publish radio button, Click Submit

The page will now be removed from the server.

Publishing the Entire Site

Let’s explore how an entire site is published within Cascade Server.

1. To select your base folder,

   - Click the CASCM folder

2. To publish the site,

   - Click the Publish tab, Click Submit

All of the configurations of the pages have been published.
Using Versions in Cascade Server

While our site is publishing, let’s take a look at version control and how it relates to assets in Cascade Server.

Cascade Server keeps track of previous versions of an asset so that, at any time, a publisher, manager, or administrator can roll an asset back to a previous state. We will explore this functionality with our contact page.

1. To view the contact page, in the Asset Tree,

You see:

We will explore versioning here by activating the version of our contact page with the phone number 555-666-7777.
2. To view the versions,

- Click the More tab, - Click Versions

**NOTE:** Notice that the Delete option is located under the More tab for pages.

You see a list of all the versions of the contact page. Let’s choose the most recent past version of the asset. It’s the second page in the list.

3. To view the most recent past version of the contact page,

- Click the second contact page link in the list

We see the contact page with the old phone number (555-666-7777). Notice that we also have a Viewing option at the top of our page:

<table>
<thead>
<tr>
<th>View</th>
<th>More</th>
<th>Configure</th>
<th>Property</th>
<th>Logic</th>
<th>Configurations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing</td>
<td>Viewing a Version</td>
<td>Bolder</td>
<td>Older</td>
<td>Current</td>
<td>Activate</td>
</tr>
<tr>
<td>Outputs</td>
<td>HTML</td>
<td>PDF</td>
<td>Printer friendly</td>
<td>XML</td>
<td></td>
</tr>
</tbody>
</table>

From here, we can navigate up (Newer) and down (Older) the stack of versions as well as compare the version with the Current version of this asset. We can also view the Current version by itself or delete this version altogether. The option we are interested in is the Activate link.

4. To activate this old version, in the Viewing options,

- Click Activate

We see the Operation Successful feedback and our old version is now the active version of the contact page.

**Reviewing the Published Content**

After your pages have made it through the publishing queue, we will take a look at the published content to ensure everything happened as expected.

1. To navigate to the published content, in the address bar of a web browser, type:

   http://mypage.iu.edu/~wcms###

   Ensure that the pages we created are all on the server.
Wrapping Up

We’ve reached the end of today’s workshop. Please follow your workshop instructor’s guidance and take a few moments to fill out the workshop evaluation form.

Also, before leaving, please log off your computer.

Thank you for participating in

*Cascade Server: Contributors, Approvers, and Publishers*

Contributions to These Materials

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Leader</td>
<td>Tom Mason</td>
</tr>
<tr>
<td>Project Developer</td>
<td>Tom Mason</td>
</tr>
<tr>
<td>Editor(s)</td>
<td>Joe Brumley</td>
</tr>
<tr>
<td></td>
<td>Sandy Doell</td>
</tr>
<tr>
<td></td>
<td>Veronica Mount</td>
</tr>
<tr>
<td></td>
<td>Amy Neymeyr</td>
</tr>
<tr>
<td></td>
<td>Jennifer Oakes</td>
</tr>
</tbody>
</table>
Where to Go From Here

You can use the resources listed below to further build your computing skills.

Taking Other IT Training & Education Workshops

UITS IT Training & Education offers hands-on instructor-led computing workshops aimed at a variety of skill levels, covering a broad range of topics. We teach hundreds of workshops on more than 80 topics every year! For more information, to see a detailed workshop schedule, or to register for a workshop, contact IT Training & Education:

Web: http://ittraining.iu.edu/
Email: (IUB) ittraining@indiana.edu; (IUPUI) ittraining@iupui.edu
Phone: (IUB) 812/855-7383; (IUPUI) 317/274-7383

Getting Help from Online Resources

University Information Technology Services – IU technology resources, services and support: http://uits.iu.edu/

IT Training Online – Self-paced IT courses you can take on your computer: http://ittraining.iu.edu/online/

UITS Knowledge Base – Searchable database of computing questions: http://kb.iu.edu/

IT Training Tips – Comment-enabled blog with training articles and videos: http://ittrainingtips.iu.edu/

Getting Help from Support Staff


(IUB & IUPUI) Consultants in the UITS Student Technology Centers

24 Hour Phone Support (IUB) 812/855-6789 (IUPUI) 317/274-4357

E-mail Support (All IU campuses) ithelp@iu.edu