Cascade Workflow Essentials *(Revised: 6.23.2022)*

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Cascade Information and Assistance

- For **training** and **technical help**, please email the SCSU Web Team at: web@stcloudstate.edu.
- For **content** and **workflow assistance**, please email University Communications at: ucomm@stcloudstate.edu.
- For more information and examples, visit: https://www.stcloudstate.edu/wcms-documentation/.
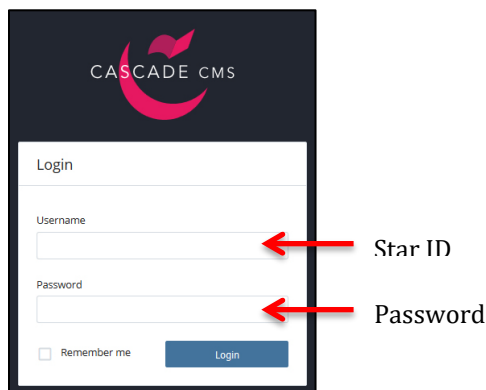
Logging In

Recommended Browsers

- Cascade Server is accessed through a web browser anywhere the internet is available.
- Browsers: Google Chrome, Microsoft Edge, Mozilla Firefox, Apple Safari.

Access Cascade

URL: https://wcms.stcloudstate.edu
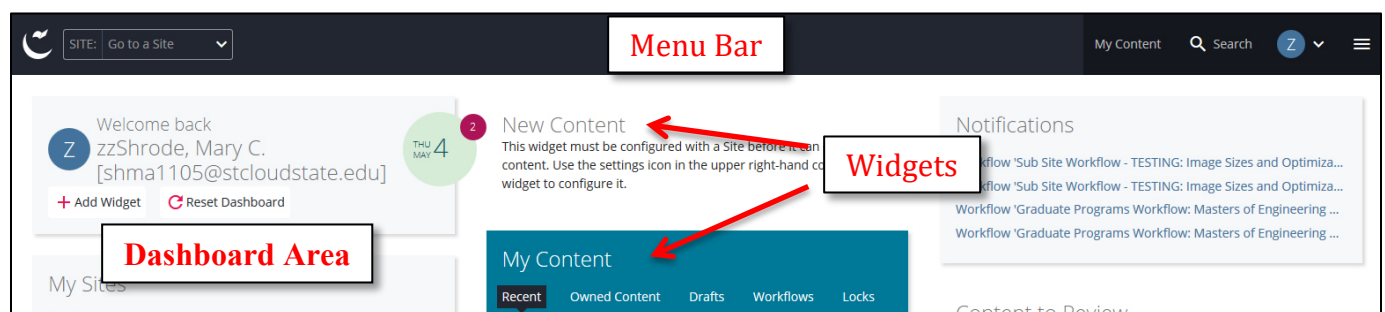
Overview of Menu Bar

- **Cascade "C" logo:** Takes the user to the Cascade dashboard.
- **SITE: Go to a Site:** Site selection.
- **My Content**: Shows recently viewed assets, drafts, workflows, etc.
- **User Icon**: Indicates individual signed in, setting option for using asset title or display name preference, history, notifications, tasks and "**Sign Out**".

Dashboard

The dashboard provides the user with a summary of activities. The dashboard can be accessed at any time by selecting the **Cascade "C" logo** on the main menu. The users can customize and configure their preferred widgets in this area.

Site Selection

Start by using the **Site:** selection dropdown menu to choose a site to view and edit.
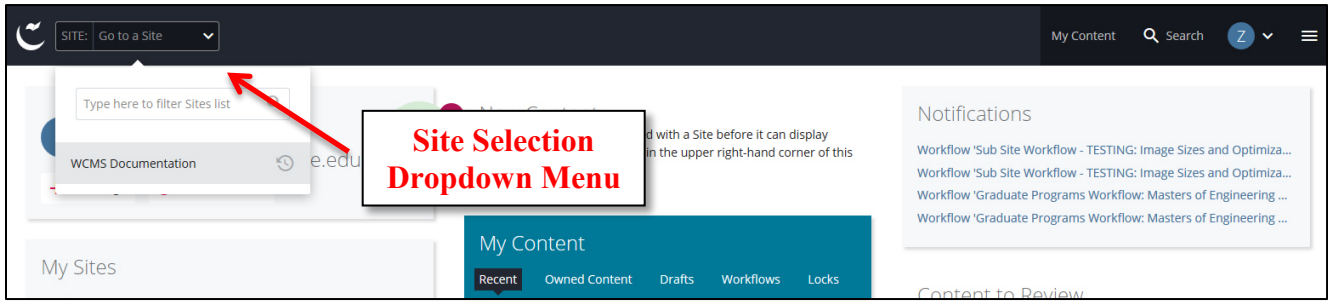
Asset Tree

- Outlines website assets: Site folders, files, documents and images.
- A context menu is available by hovering over an asset and right clicking.
- Navigate throughout the site by clicking on assets or "CURRENT-PAGE-NAVIGATION" links in the page view.
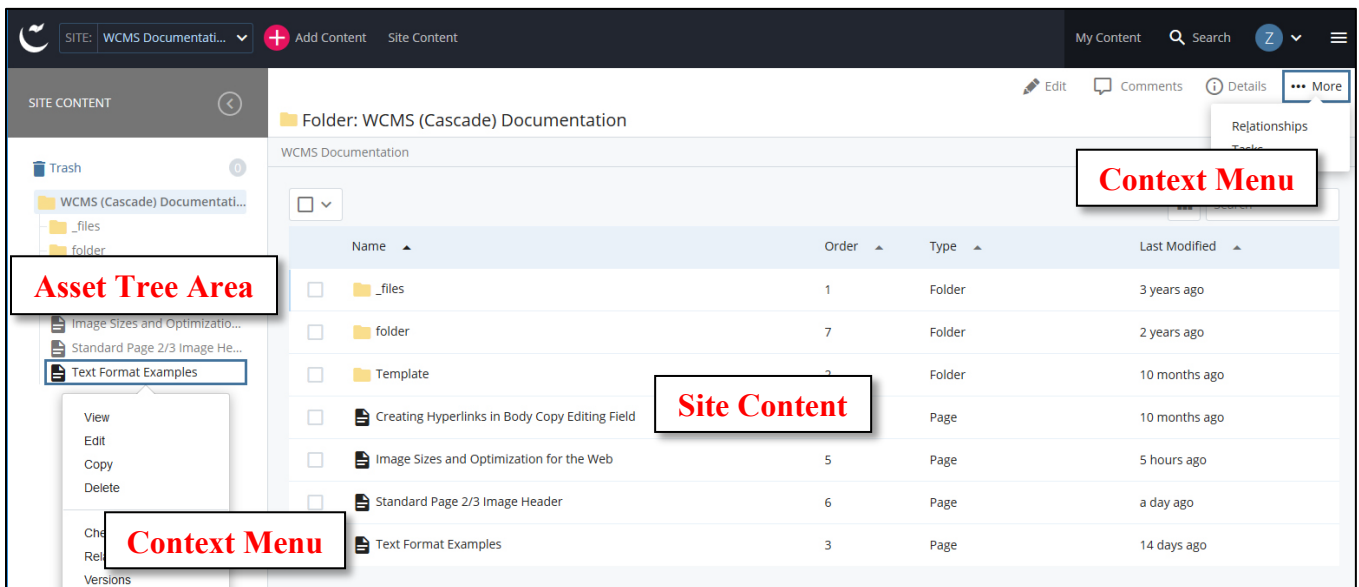
Editing

Edit an Existing Page

1. Click on the page (file) to edit within the Asset Tree or in the site content.
   - A preview of the page appears to the right of the Asset Tree.
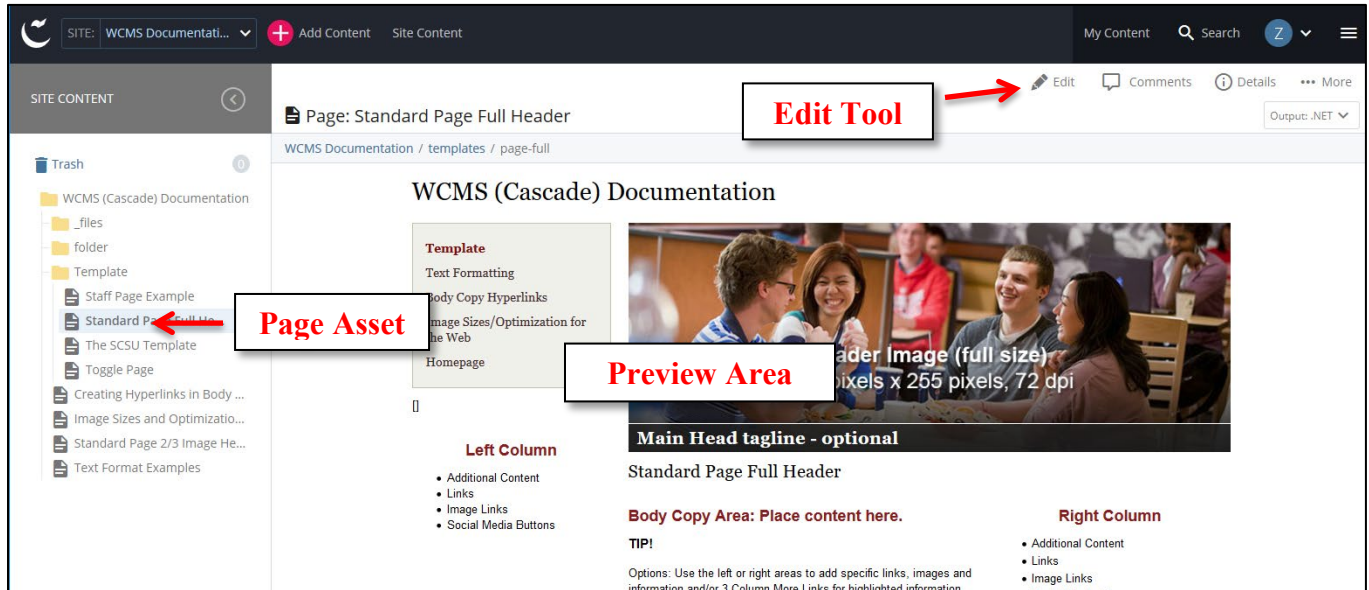
TIP: Hover the mouse over the Preview to find the name of the editing field area to look for when editing.
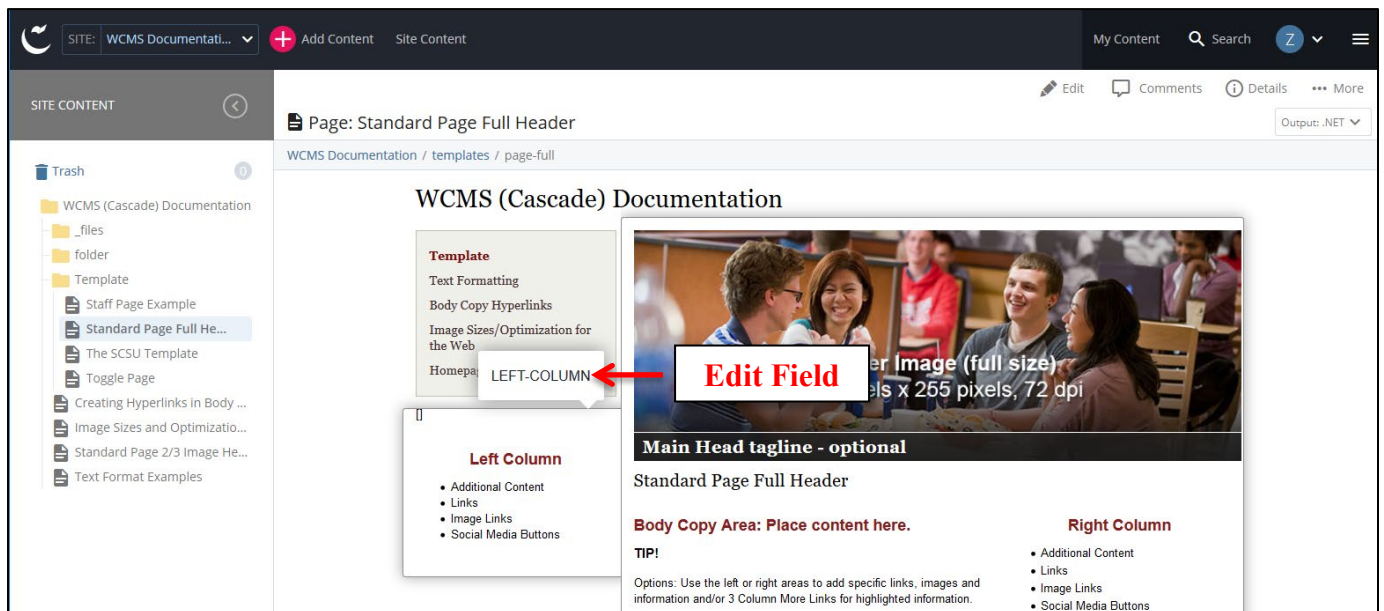
2. Click on the **"Edit"** tool or choose **"Edit"** in the file's context menu in the Asset Tree.
    - Edit fields for the page appear.

Edit Information in Other Fields as Needed

Inline Metadata *(this information is present on already existing pages and can be edited)*

- **Display Name** *(required)***:** Appears in the left navigation area and in the top red banner area.
- **Title** *(required)***:** Usually the same as Display Name and appears in search results and browser title bars with "| St. Cloud State University" added.
- **Keywords** *(optional)***:** Any extra keywords that would be helpful for searching via St. Cloud State University's website search.
- **Description** *(required)***:** Short descriptive sentence about the page that appears in the search results on Google, Bing, Yahoo, etc.

Apply/Request Information Buttons *(optional)*

1. Click on **"Apply/Request Information"** button to open.
2. Click on **"Apply Link** or **Request Information Link"**.
3. Enter **URL Link** (include http://) OR click on the **"Choose Page"** to link to an internal Cascade page.
4. Enter text in the **"Button Text Override"** field to customize the default "Apply Online" or "Request Information" button text.

TIP: Correctly prepared images and documents must be uploaded into their respective folders in the Cascade "_files" folder prior to linking to them from pages.

1. Click on **"Header Image and Links"** button to open.
2. Check the **"Display Header?"** "Yes" box.
3. Choose **Standard** or **Slider** (Slider allows for multiple images and overlay text).
4. Enter text for **"Main head (large)"**
   (optional text that overlays across the bottom of the image).
5. Click **"Image Header"** image chooser icon to select the image.
6. Enter text for the **"Alt Tag"** of the image (short description).

"Display Callouts?" **option** (used with a 2/3 size header photo)
   1. Check "Yes" box if this element is wanted.
   2. Click **"Link Callouts"**.
   3. Click **"Link"**.
   4. Under **"Image"**, click **"Choose File"** to select the image.
   5. Enter text for the **"Alt Tag"** of the image (short description).
   6. Enter text for the **"Sub Head (small)"** the first line of the text.
   7. Enter text for the **"Main Head (large)"** the second line of the text.

   Create Link
   1. **"Page Link"** links to a page within Cascade OR
   2. **"File Link"** links to a document (pdf, docx, etc) within Cascade OR
   3. **"Link URL"** enter URL to external web page (include http://).
   4. **Click** the plus sign (+) for adding more link areas, delete (x) sign to remove links and arrow icons to change the link order.

Body Copy

Set the cursor in the **"Body Copy"** area of the WYSIWYG *(What You See Is What You Get)* editor field to edit or create content. This area is where most of the editing and content creation will occur.

Right Column *(optional)*

These are optional elements that will be displayed to the right of the body copy.
   1. Click on **"Right Column"** button to open.
   2. Check the **"Display Right Content Column?"** "Yes" box.
   3. If a border is desired, check the **"Add Border?"** "Yes" box.

The optional elements that are available:

Click **"Button Links"** **option** to create buttons.
   1. Check the **"Display Additional Links?"** "Yes" box.
   2. Click **"Link"** to link to a page, file or URL.
   3. Enter text for **"Button Text"**.

   Create link
   1. **"Page"** links to a page within Cascade OR

2. **"File"** links to a document (pdf, docx, etc) within Cascade OR
3. **"Link URL"** enter URL to external web page (include http://).

Click the plus sign (+) for adding more link areas, delete (x) sign to remove links and arrow icons to change the link order.

Click **"Additional Links"** **option** to create text links.
4. Check the **"Display Additional Links?"** "Yes" box.
5. Enter text for **"Title (not required)"** (optional).
6. Click **"Link"** to link to a page within Cascade.
7. Enter text for **"Link Text"**.

Create link
4. **"Page"** links to a page within Cascade OR
5. **"File"** links to a document (pdf, docx, etc) within Cascade OR
6. **"Link URL"** enter URL to external web page (include http://).

Click the plus sign (+) for adding more link areas, delete (x) sign to remove links and arrow icons to change the link order.

Click **"Image Links"** **option** to link to an external URL
1. Check the **"Display Image Links?"** "Yes" box.

Create Internal Link
1. **"Page"** links to a page within Cascade OR
2. **"Image image (217px x 109px)"** links to an image within Cascade's "files → images folder".

Create Image Link
1. Enter text for **"Link Text (alt)"**
3. **"Page"** links to a page within Cascade OR
4. **"Link URL (http://)"** enter URL to link to an external web page (include http://) OR
5. **"Image image (217px x 109px)"** links to an image within Cascade's "files → images folder" (images must be already uploaded into the system).

Click **"Additional Content"** **option** to use a WYSIWYG *(What You See Is What You Get)* editor to create a block of content.
1. Check the **"Display Additional Content?"** "Yes" box.
2. Set the cursor in the **"Body Copy"** area of the WYSIWYG editor field to edit or create content.

Click **"Social Media"** **option** to link to Facebook, Twitter, LinkedIn, YouTube and Instagram.
1. Click the **"Display Social Media?"** "Yes" box.
2. Click on **chosen social media type** (Facebook, Twitter, LinkedIn or YouTube**)**.
3. Enter text for **chosen social media type** (Find, Follow, etc).

Create link

1. **"… Link (http://)"** enter URL to link to an external web page (include https://).
2. **Click** the plus sign (+) for adding more link areas, delete (x) sign to remove links and arrow icons to change the link order.

3 Column More Links *(optional)*

These are optional elements are boxes of text and links that will be displayed at the bottom of the page.

1. Click on **"3 Column More Links"** button to open.
2. Check the **"Display 3 Column More Links?"** "Yes" box.
3. Enter text for **"Title (required)"**.
4. Click **"Link"**.
5. **Click** the plus sign (+) for adding more link areas, delete (x) sign to remove links and arrow icons to change the link order.
6. Enter text for the **"Header"**.
7. Enter text for the **"Content"**.
8. Choose **"Use header as link"** or **"Add link text"**
   ○ If choosing **"Add link text"**, enter text for the **"Link Text"** *(text example: Learn more…)*.
9. If no link is entered, no link is created within the box. The space serves as a simple announcement with no link to additional information.

Create link

1. **"Page"** links to a page within Cascade OR
2. **"File"** links to a file within Cascade OR
3. **"Link URL"** enter URL to external web page (include http://).

OR

Create Link Collection option (an area with a list of multiple links)

1. Click on **"Link"**.
2. **Click** the plus sign (+) for adding more link areas, delete (x) sign to remove links and arrow icons to change the link order.
3. Enter text for the **"Link Text"**.

Create Link

1. **"Page Link"** links to a page within Cascade OR
2. **"Link URL"** enter URL to external web page (include http://).

Left Column *(optional)*

These optional elements are similar to the Right Column elements listed previously and will display in the left column below the navigation.

- **"Button Links" option**.
- **"Additional Links" option**.
- **"Image Links" option**.
- **"Additional Content" option**.
- **"Social Media" option**.

Creating Hyperlinks in Body Copy Editing Field

TIP: For ADA compliance, **do not use the phrase, "Click Here"** for links. Use a descriptive phrase or the name of a person to be emailed and enter the desired destination URL or mail to address.

Internal Webpage or Document

1. Highlight the text to link to a website page inside of the site.
2. Click **"Insert/Edit"** icon (chain links) in the tool bar or right-click for the contextual menu.
3. **"Insert/Edit Link"** dialog box appears.
4. Click **"Internal"** check box.
5. In **"Link"** section, click **"Choose File, Page, or Link"** to select desired page or document to link.
6. Click **"Ok"**.

External URL

1. Highlight the text to link to a website page outside of the site.
2. Click **"Insert/Edit"** icon (chain links icon) in the tool bar or right-click for the contextual menu.
3. **"Insert/Edit Link"** dialog box appears.
4. Click **"External"** check box.
5. In the **"Link"** field, type or copy/paste the URL including "http://".
6. Click **"Ok"**.

Email

1. Highlight the name to link to an email address.
2. Click **"Insert/Edit"** icon (chain links icon) in the tool bar or right-click for the contextual menu.
3. **"Insert/Edit Link"** dialog box appears.
4. Click **"External"** check box.
5. In the **"Link"** field, type or copy/paste the email address including "mailto:". Example: mailto:name@address.
6. Click **"Ok"**.

Start Workflow

Submission of Page to Workflow

After editing a page, it must be sent to workflow, saved as a draft which only the user will see or discarded using the buttons in the upper right area of the page.

1. **"Save and Preview"** to save a draft preview of the page.
2. **"Submit"** submits the page into the system for review (does not publish page to server). **Option:** Notes for the user regarding the page version can be typed in the **"Comment on the changes you made"** dialog box.
3. **"Check Content & Submit"** performs spell check and broken link checks.
4. **"Next"** displays spelling errors and broken links if there are any.
5. **"Comments for reviewer"** must contain a brief description of the changes made that would be helpful to the Workflow Administrator.

6. **"Start Workflow"** initiates a review process. The Workflow Administrator is notified to review the page and take action. An automated email notification is sent to the user upon completion of the workflow.

Approval Actions

- **Approved:** If approved, user will get an email stating that the Workflow has been completed. The changes have been submitted to the system and published to the live page. No additional attention needed.

Example completed email:

The workflow 'Graduate Programs Workflow: Executive Masters of Engineering Management Requirements and Details' has completed.

Please click the following link to go to your Dashboard:

https://wcms.stcloudstate.edu

- **Delete:** If administrator finds the changes unnecessary, they many delete the draft. User will receive a notification email including comments as to why it was deleted.

- **Reject to Initial User:** If administrator requests additional changes to be made before approval, user will get a notification email including comments about what changes are suggested.
  - User will make additional edits and then Submit to Workflow again to reinitiate the review process.

Example notify email:

1. Click on **"View the workflow screen"** link to edit.

Your attention is needed regarding the workflow: Graduate Programs Workflow: duka9701

User options:

- Go to the dashboard
- View the asset
- View the workflow screen

Comments from qs9993ae:

sending back for changes

Workflow History:

- [Oct 30, 2015 1:28 PM] (**duka9701**) *Started workflow*

  change again

- [Oct 30, 2015 1:28 PM] (**duka9701**) initialize from initialize to admin-approval
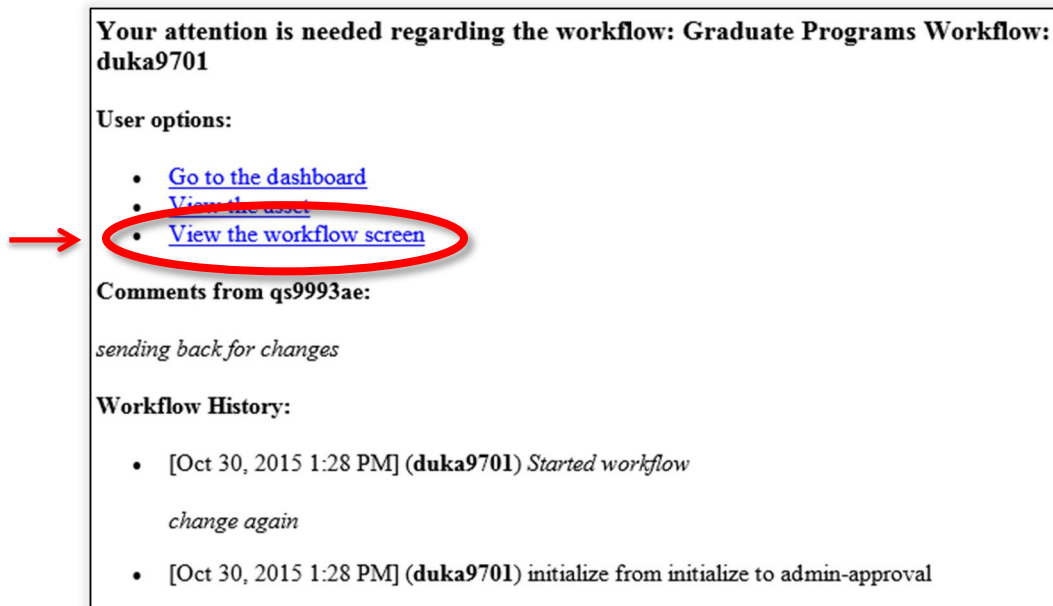
2. Click on **"Edit"** under **"Available Actions"** to make new or suggested edits.

SITE: WCMS Documentati... ⌄ ⊕ Add Content   Site Content   My Content   🔍 Search Z ⌄ ≡

Workflow in progress - Sub Site Workflow - TESTING: The SCSU Template

Sub Site Workflow - TESTING: The SCSU Template   Back to Page

Edit by initial user - Optional Step

Initiated By
👤 shma1105

Started On
May 9, 2017 3:41:38 PM

Asset in workflow
📄 The SCSU Template

Current Step Owner
👤 shma1105

This workflow is due 6 days from now.

Available Actions

Edit ← **Edit**

3. When edits are made, Click **"Save & Preview"**.
4. Click **"Advance"**.
5. Enter comments and click **"Check Content & Submit"**.
   Click **"Next"**.

Folders, Documents and Images

Replace Existing Documents and Images

If there is a _files folder available that contains documents and/or images folders, the files in those folders can be replaced with updated versions.

1. Click on **"_files"** folder.
2. Click on **"documents"** or **"images"** folder.
3. Click on existing document or image file.
4. Select **"Edit"**.
5. **"Drop a file here"** OR **"choose"** to find replacement file.
   (File can be named anything, but Cascade will keep the system name as there is no option to change the name. This will keep existing links to the file from breaking.)
6. Click "**Save & Preview**".
7. Click **"Submit"**.
8. Click **"Start Workflow"**.
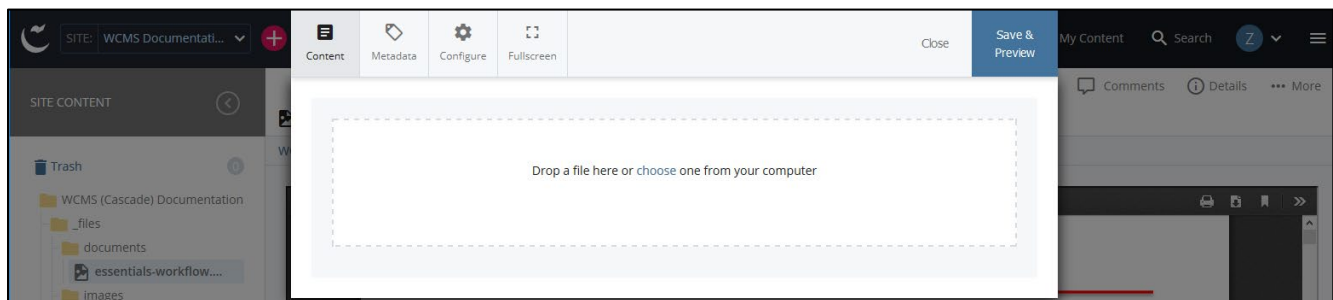
Adding New Documents, Folders and Images

Create folders and upload documents and images.

1. Click **" + Add Content"** in the top menu bar.
2. Click **" _SCSU Sub Sites"**.
3. Select either **"Document"** OR **"Image"** OR **"Folder"**.
4. Check the text for **"System Name"**. This automatically pulls in the name of the chosen file (see File Naming Convention below).
5. If necessary, select appropriate **"Placement Folder"**.
6. **"Drop a file here"** OR **"choose"** to find replacement file.
   After creating a folder or uploading a document or image:
7. Click "**Save & Preview**".
8. Click **"Submit"**.
9. Click **"Start Workflow"**.
10. Enter a brief description of the changes made in **"Comments"**.
11. Click **"Start Workflow"**.
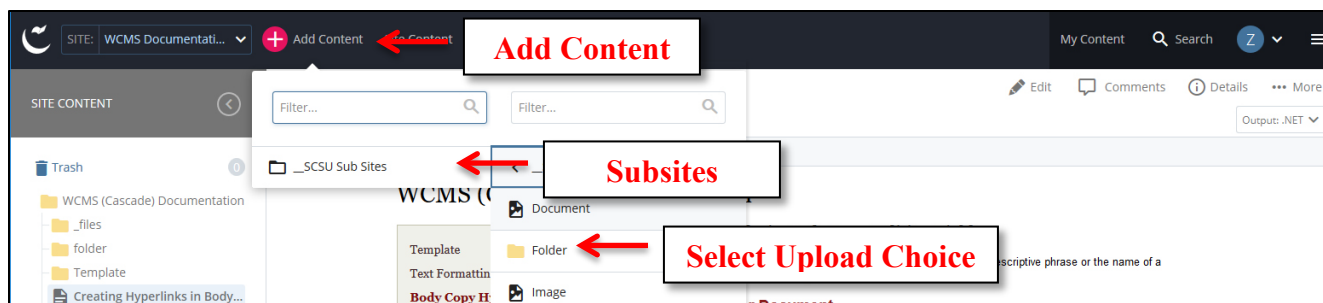
TIP: Uploaded file types are located in their respective placement folders ("documents" or "images" folder) inside of the **"_files"** folder.

File Naming Convention

Properly name files and folders.
- All lower case letters
- Numbers acceptable
- Dashes for spaces
- No special characters

Examples of appropriate system names: "**contact-us**", "**faculty-staff**", "**newsletter-2016**", etc.

Document file names must include the document type extension .PDF, .DOCX, or .XLSX, etc., so that the system will preview it internally. Remove any spaces or special characters. Examples: "document-name**.pdf**", "document-name**.doc**".

Image file names must include the image type extension .JPG, .PNG, or .GIF, etc., so that the system will preview it internally. Remove any spaces or special characters. Examples: "image-name**.jpg**", "image-name**.png**".