CMS Overview

- Content Management System
- Paradigm shift  >>  Stronger more unified UH identity
- Enables non-technical contributors
- Also enables magical illusions
- And is designed to be a Web-Page Factory
Server hosting the CMS

staging/testing server

LIVE/production server

Web-Page Factory
Server hosting the CMS

Cross-platform availability via Browser access

Web-Page Factory

LIVE/production server

staging/testing server

Browser Views

Web Page (.php)

Web Page (.php)

CMS

Page Asset

Page

Asset
Web-Page Factory

Server hosting the CMS

Cascade is not a live-edit application

staging/testing server

LIVE/production server

Web Page (.php)

Web Page (.php)
CMS = 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

Server hosting the CMS

Dynamic - but not live-edit

staging/testing server

Static version

LIVE/production server

Static version

The Publisher

CMS functionality which assembles all instructions and creates separate, STATIC versions of your materials on the server. Items ‘update’ by being overwritten.
CMS TERMINOLOGY

Publishing Destinations

Usually at least two (may be more)

Server hosting the CMS

staging/testing server

non-crawled
keep URL private

LIVE/production server

public – viewable by anyone
Web-Page Factory

**SOME CMS BEST PRACTICES**

1. **Server hosting the CMS**
   - staging/testing server
     - keep secure
     - do not share URL

2. **CMS**
   - Build and preview inside CMS
   - **LIVE/production server**
     - public – viewable by anyone
SOME CMS BEST PRACTICES

1. Build and preview inside CMS
   - Server hosting the CMS

2. Publish to staging & review
   - staging/testing server
   - keep secure
do not share URL
   - LIVE/production server
     - public – viewable by anyone

Web-Page Factory
**Web-Page Factory**

**SOME CMS BEST PRACTICES**

1. **Build and preview inside CMS**
   - Server hosting the CMS

2. **Publish to staging & review**
   - staging/testing server
     - keep secure
     - do not share URL

3. **Go Live!**
   - LIVE/production server
     - public

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**Web-Page Factory**
CMS:

New with Cascade v.8 is the user’s ability to 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
New with Cascade v.8 is the user’s ability to 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
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
SOME CMS BEST PRACTICES

System Names:

• Should be all lower-case letters
• Should contain no spaces
• Prefer dashes over underscores to separate words
• Avoid “special” or punctuation characters
  e.g.  ! @ # $ % & * ( ) = ? . , ; “ ”

• Should not be confused with Metadata
• Relates exactly to the Web URLs of published materials

Know System Name rules
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

- Learn more from the Handout and from the UIT site:
  [https://www.uh.edu/infotech/services/web-services/cms/cms-how-tos/understand-metadata/](https://www.uh.edu/infotech/services/web-services/cms/cms-how-tos/understand-metadata/)

Metadata text should be grammatical - use those Capitals & spaces! It can contain limited punctuation (e.g. ‘&’ for ‘and’)

Understand CMS Metadata
CMS TERMINOLOGY

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

Un-publish vs Delete

staging/testing server
non-crawled
keep URL private

LIVE/production server
public – viewable by anyone
CMS TERMINOLOGY

Un-publish vs Delete

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

LIVE/production server
- public – viewable by anyone

staging/testing server
- non-crawled
- keep URL private

Server hosting the CMS
CMS TERMINOLOGY

CMS:
Un-publish = keeps item in CMS but gets rid of it from the server.
Delete = removes items from CMS itself.

Un-publish vs Delete

Server hosting the CMS

staging/testing server
non-crawled
keep URL
private

LIVE/production server
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CMS TERMINOLOGY

Server hosting the CMS

CMS: Un-publish = keeps item in CMS but gets rid of it from the server.
Delete = removes items from CMS itself.

staging/testing server
non-crawled
keep URL
private

LIVE/production server
public – viewable
by anyone
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 – so, remember to ‘unpublish’ first, or you could leave ‘orphaned’ files for search engines to find.
CMS TERMINOLOGY

Server hosting the CMS

staging/testing server
non-crawled
keep URL private

LIVE/production server
public – viewable by anyone

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’.

Orphaned Files
CMS TERMINOLOGY

Server hosting the CMS

staging/testing server
- non-crawled
- keep URL
- private

LIVE/production server
- public – viewable by anyone

CMS:
- only you can prevent Orphaned files

SO REMEMBER –
- Before Deleting, Moving, or Renaming, Un-publish first.
Server hosting the CMS

staging/testing server
- non-crawled
- keep URL private

LIVE/production server
- public – viewable by anyone

CMS TERMINOLOGY

ALSO REMEMBER –
• When Moving, or Renaming an item which had previously been published, remember that Copies of items can be used for Unpublishing, then deleted without impact, as the Server only cares about the system-names and site structure, not dynamic relationships.

CMS:
only you can prevent Orphaned files
CMS TERMINOLOGY

- **Server hosting the CMS**
- **staging/testing server**
  - non-crawled
  - keep URL private
- **LIVE/production server**
  - public – viewable by anyone

**CMS: only you can prevent Orphaned files**

- **UN-PUBLISH using COPY**
  - PUBLISH original again

**ALSO REMEMBER –**
- When Moving, or Renaming an item which had previously been published, remember that *Copies of items can be used for Unpublishing, then deleted without impact*, as the Server only cares about the system-names and site structure, not dynamic relationships.
CMS TERMINOLOGY

Server hosting the CMS

staging/testing server
non-crawled
keep URL private

LIVE/production server

Finding your way around the Webpage

Web Page (.php)
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.
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.
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: http://www.uh.edu/nsm/biology-biochemistry/

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 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:
(UI/UX) Manager, Lead Front-End Developers, and Mobile Responsive Designer
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