

# Hannon Hill Corporation

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Makers of the Award-Winning Cascade Server content management software

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## Glossary - Cascade Server

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### A

#### Accessibility Checker

The Accessibility Checker (called the 508c checker in versions 3.7 and below) checks and reports errors that, when resolved, result in an enhanced accessibility for published content for the Web Accessibility Initiative (WAI) Guidelines.

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#### Actions

One workflow step is connected to another by an **Action**, which is a direct path from a source step to a destination step.

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#### Administrator

Administrator is a [role](#) in the system that permits full, uninhibited access to any asset and/or area of the system. A user assigned the administrator role has access to both the standard "**Home**" area where web page assets are managed and the "**Administration**" area where advanced system entities and publishing can be configured. Folder access rights do not apply to the administrator role; therefore, a user with administrator rights can view, edit, copy, delete, or move an asset without restriction. Additionally, administrators have the ability to break asset locks anywhere in the "**Home**" area.

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#### Advanced Search

Advanced Search offers a more fine-tuned search capability than the [basic search](#), and is based on the asset name, asset path, asset contents, asset metadata fields, and/or asset types. In addition to the standard search term field, Advanced Search includes check boxes to select types of content to search for, and can be used to filter asset types and search for metadata fields.

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#### Advanced Tab

The Advanced tab is a feature that consolidates less frequently used tabs and several features available only to administrators and managers. It is located at the top of the dashboard and was implemented to provide a more simplified user interface and

streamlined user experience. The features now located under the Advanced tab are Access, Audits, Reference, and Versions.

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## Approver

Approver is a [role](#) in the system and can be assigned to a [User](#) or a [Group](#). The Approver role allows the same actions as the [Contributor](#), as well as allowing the user to take part in the workflow process and review and approve (or reject) content that belongs to an active workflow.

Approvers may be given read or write access to areas in the system. These access permissions are set by an [Administrator](#) at the folder level and are set for an individual User, Group or for All Users. Actions taken by an Approver-level user within Cascade Server will go through a pre-determined workflow process similar to that of a Contributor-level user in order for the action to be completed, which may include approvals by other Approver-level users.

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## Asset Archive

When a publishable Asset (Page, File, or Folder) passes its expiration date as specified in its metadata, it will be archived. The archival process involves two steps:

1. The asset will be unpublished (removed from the remote server),
2. The asset will be moved in the CMS to the Expiration Folder (as defined in the asset's metadata)

If no expiration folder is specified, the asset will still be un-published; however, it will not be moved in the CMS.

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## Asset Factory

An asset factory provides a way to create a specific type of [asset](#) or specially configured page, such as blocks, external links, files, folders, pages, stylesheets, and templates. New assets created via the asset factory need not be based on any particular asset, and may be placed in any folder. Access to asset factories and the assets they create are determined by user access rights.

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## Assets

An Asset is any entity within the system that can be used to generate content. Many different types of entities can be assets: images, CSS stylesheets, XML blocks, pages, and more. For ease of classification, assets are divided into several different groups:

1. **Page** - This is a mutable asset built by the CMS from other assets to create the finished product of published documents such as web pages or XML documents.
2. **File** - may be a jpeg image, CSS file, or any other indivisible and immutable asset.

3. **Block** - a "pluggable " piece of content that can be easily substituted, with or without styling, into any page region. As the name suggests, these are the building blocks from which other blocks and pages are built.
  4. **Stylesheet** - an XSLT stylesheet is used to transform XML block
  5. **External Link** - a symbolic link to a specific URL
  6. **Folder** - a container within Cascade that acts a parent asset to other assets.
  7. **Template** - the basic building block for a page's layout.
  8. **Reference** - a special asset that is created to represent an existing asset in another location, allowing it to be indexed in multiple folders.
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## Audit Trail

The Audit Trail is a tool for Administrators to see a summary of activities performed in the system by a particular user, group, role, or for the entire system. Selecting the audit trail for a group or roles will display the actions performed by all users belonging to that group or role. A date/time filter is provided as part of the Audit Trail view and is useful for filtering the results into a more specific timeframe.

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## Authentication

Login Authentication is the process of checking usernames and passwords provided at log-in against authorized credentials. It is accomplished by CMS in one of three ways:

1. Built-in authentication, which stores user information in the database used for other CMS data storage
  2. LDAP authentication, accomplished by querying your LDAP-enabled directory server (Active Directory, OpenLDAP, etc.) to retrieve user information.
  3. Custom login authentication. This authentication is determined by the administrator of the client network. Please consult your network or CMS administrator for more details.
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## Available System Tags

Cascade Server provides users with additional functionality by implementing proprietary pseudo tags throughout the system.

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## B

### Base Folder

The Base Folder is the top-level folder for [assets](#) and [folders](#) located in the Home area. Within the Home area, all assets have a parent folder, including folders themselves. The top-level folder is called the Base Folder because it is the only folder that does not

have a parent. Therefore, the Base Folder is the root folder for all other Home assets in Cascade Server.

When multiple sites are managed within the same instance, the Base Folder may also be used to refer to the top folder for a specific site.

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## Basic Search

Basic Search provides an easy way to perform powerful searches within the CMS content repository. The single search field automatically searches all searchable assets across the name, content, and metadata fields. The content for each asset is typically the XML or XHTML field. A **basic search** is based on the asset name, asset path, and/or asset contents. To search content within the system, use the Basic Search tool.

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## Block

A Block is a 'pluggable' piece of content that can be easily substituted (with or without styling) into any page region. Therefore, whenever there is content that is common to many pages or regions, i.e. an "About the Company" section that appears after every press release and newsletter, that content should be put into a block. Doing so allows the appropriate content to appear in many pages while always being updated from one place, making it easy to maintain consistency in that text/markup across many pages. Cascade users can reuse a single block on an unlimited amount of page regions.

The text or markup contained by a block can be plugged into a page region at three different levels: the template level, the page configuration level, or the page level. When a block is plugged into a page region at the template level, the block content will appear in any pages using that template. Any blocks assigned at the page configuration level will appear in any pages using that configuration.

There are five types of Blocks in Cascade Server:

1. **Index Block** - used to dynamically generate system assets as XML
2. **Text Block** - static text content
3. **XML Block**- static XML content
4. **XHTML Block** - static XHTML content
5. **XML Feed Block** - dynamic XML from a third-party server (e.g. RSS feed)

(For more information on each type of block, please see each block's individual page)

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## Breadcrumbs

Breadcrumbs are a type of [Dynamic Navigation](#) typically used for every page except the home page. By showing a backwards pathway from the current page back to the home page, breadcrumbs ensure that users know where they are and how they got there.

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## Bulk Change

The Bulk Change Wizard is a tool in Cascade Server that can be used to change [Configuration Sets](#), [Metadata Sets](#) and [Content Types](#) across a large group of assets, in a single operation. The Bulk Change Wizard also allows administrators to "flatten" a folder structure by moving descendant items into a single folder. This is done by changing the parent folder of all items with the Bulk Change Wizard. The Bulk Change Wizard is also a perfect companion tool when using the [New Site Wizard](#).

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## C

### Check In and Out

Often a user will want to retain control of an asset in the CMS, such that while that user has "locked" the [asset](#), no other changes by other users may be made to that asset. This process of locking an asset is called "**Checking Out**", while releasing such a hold on the asset is referred to as "**Checking In**". If a [user](#) has checked out an asset and wishes to cancel his or her changes, that user would then break or cancel the lock, effectively discarding the changes. Checking in changes made to a locked asset commits the changes back into the CMS and breaks the lock.

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### Components

A component is any entity managed within the administration area of the system. Components include all elements found in the Administration area that are used to create and render assets for a site.

Components serve many purposes, from facilitating creation of content, managing and publishing content, and management of system users. For ease of classification, components are divided into several different groups:

- **User** - One who uses the content management system.
- **Group** - One or more users with common permissions.
- **Role** - Determines the abilities and permissions of a User or Group.
- **Asset Factory** - A way to create a specific type of asset or specially configured page.
- **Configuration Set** - A grouping of Configurations, making them more manageable.
- **Content Types** - Formally aggregates Configuration Sets, Metadata Sets, and Data Definitions into a single Administrative component that can be applied to pages.
- **Data Definition**- A form-based input field for the creation and editing of page content, as well as generation of XML data from user-provided input in said input fields.
- **Metadata Set** - Provides the interface for customizing the kinds of metadata fields that can be visible and/or associated with an asset.
- **Publish Set** - Directs groups of publishable assets to be published on-demand or on a schedule.

- **Target** - Represents a site or subsite and specifies the format in which content should be published (XHTML, XML, etc).
  - **Destination** - Links a target to a transport, specifies encoding (UTF-8 or ASCII), and allows for publishing content on a schedule.
  - **Transport** - Stores data concerning how published content is pushed out to the final publish location.
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## Configuration

A Configuration is a special component that is typically accessed from the context of a page asset. For example, a page might have "HTML," "Text Only," and "XML" configurations. This allows common content (defined in the page itself) to be rendered using different templates and output types. Each page in Cascade must have at least one configuration, and can include as many as you need for your site. For example, a page may have HTML, text only, and XML configurations.

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## Configuration Set

A configuration set is a collection of one or more [configurations](#) that can be used to help create one or more pages. In order to be used to create a page, a configuration must be a part of a configuration set. Configuration sets that include multiple configurations are typically used when multiple [outputs](#) are required, such as HTML, XML, or printer friendly. To make large numbers of configurations manageable, Cascade uses Configuration Sets to group a number of configurations, along with their respective targets, templates, and block and stylesheet assignments.

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## Content Type

The addition of Content Types with the release of Cascade 5.5 provides users with a way of formally aggregating [Configuration Sets](#), [Metadata Sets](#), and [Data Definitions](#) into a single Administrative component that can be applied to [pages](#). Content Types provide an intuitive and logical way for end-users to identify the proper type to associate with a page by grouping together the necessary configurations for predefined page types with familiar names, such as Blog Posts, Press Releases, Announcements, etc. Much in the way Cascade Server utilizes [Asset Factories](#) to create predefined recognizable assets such as pages, templates, etc., Content Types are given simple names that clearly identify their purpose to end users. The addition of Content Types simplifies the page edit interface by consolidating previous options into one Content Type chooser. This provides a single point of control for Administrators to modify a page's Configuration Set, Metadata Set, and/or Data Definition for selected pages without requiring a Bulk Change operation.

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## Contributor

Contributor is a role in the system and can be assigned to a User or a Group. The Contributor role is the most basic role and allows only the simplest actions within the CMS. Contributors may be given read or write access to areas in the system. These

access permissions are set by an Administrator at the folder level and are set for an individual User, Group or for All Users.

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## **CSS**

The term CSS refers to a Cascading Style Sheet, which is the standard method for styling the appearance of a website. Cascading Style Sheets effectively separate the code needed to create the look and feel of a website from the actual XHTML tags that define the structure of its pages. When designing a website, it is important to separate the concepts of presentation and structure, because a site can quickly become very hard to maintain when a designer mistakenly combines them together. Because CSS properties reside inside an independent file, multiple pages within a single website can simply link to it to receive the style definitions that dictate the appearance and positions of elements on a page. When a website designer uses this modular approach to site development, it is easy to change the properties of all pages within a site by making a simple edit to the single CSS file to which all of the pages link.

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## **D**

### **Dashboard**

Upon logging in, every user is greeted with a personalized dashboard showing messages, current workflows, assets checked out, and much more general information.

The Dashboard allows users to customize viewing preferences and manage workflows more efficiently in a workspace environment best suited to the individual user.

The Dashboard, also referred to as the Home Area, is used to supply the user with a summary of the activities that require user attention. The dashboard can be accessed at any time by selecting "Home" from the main menu.

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### **Database Publishing**

Database publishing allows content (pages, files, folders, etc.) to be published to an external database for the purpose of performing live reads from a web application or any other type of application. This is made possible by setting up a database transport and a destination that uses it, and makes it possible to publish to the external database by way of that destination – the same technique used in methods of publishing such as FTP or SFTP.

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### **Data Definitions**

A data definition is a collection of XML data that has been authored by hand or by use of the data definition builder (/common/data definition builder), and it describes how a certain set of data is structured. Data definitions are used by Cascade Server to generate forms-based input fields for the creation and editing of page content, as well as to generate XML data from the input provided by users in input fields.

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## Destination

With the release of Cascade Server 6.0, there are two potential use cases for Destinations, at the system-level (in the Global Area), and on a per-site basis. When using Destinations in the Global Area, they will be linked to a system-wide target, whereas when used on a per-site basis, each Destination represents the link between a Site and the location to which site content is published. **At the Site-level:** A Destination defines the link between Site content and the location to which site content can be published. Destinations allow for publishing content on a schedule, and specifies encoding (UTF-8 or ASCII) for the published content. A Destination is associated with a single [Transport](#) that defines the protocol and location of a remote server to use when publishing content out of the system. In other words, whereas a Destination defines the link between a Site and Transport, a Transport represents the physical location of a server which can be used for any number of Sites. **At the global-level:** A Destination represents a location to which a [Target](#) can be published, allows for publishing content on a schedule, and specifies encoding (UTF-8 or ASCII) for the published content.

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## Drag and Drop Folder Reordering

Drag and Drop Folder Reordering allows users with [Contributor](#)-level write access rights and above to reorder [Assets](#) within [Folders](#) by dragging and dropping.

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## Dynamic Navigation

Navigation menus on websites are typically a graphical view of a site's hierarchy. When pages are added, deleted, moved, or renamed, all corresponding links need to be updated on the navigation menus throughout the site. Dynamic navigation allows a navigation menu to update automatically, based on the state of a website's content. There are six main types of dynamic navigation in Cascade: [Menu\(s\)](#), [Breadcrumbs](#), [Previous/Next](#), [Recent Pages](#), [Site Map](#), and [Site Index](#).

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## E

### External Link

An External Link is an [asset](#) that points to a webpage outside the system. As it is an indexable asset, an external link is useful when there is a need to include external pages in a [dynamic navigation](#) menu.

The external link records the desired URL, and the [index block](#), when rendering the external link, will write out the URL path in the rendered document.

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## F

### File

A File is considered to be any sequence of bits stored on the server's database as a single unit. For the purposes of Cascade Server, files are typically created by external programs and imported for use in Cascade.

Images, PDF documents, and text files are some common examples of files used in Cascade Server. Only text files are editable inside the system.

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### File Override

The File Override option may be used after creating an [Asset](#). If selected, the contents of that asset are overwritten with the contents of a selected file.

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### File Upload

File Upload is an option available when creating or editing files, templates, stylesheets and XML blocks. File Upload allows a user to select a file to upload from his/her hard drive, which will then be used to fill in the content of that [asset](#). When creating an asset, if no name has been specified, the name of the file from the hard drive will be inherited.

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### Folder

A folder within Cascade contains a group of related [assets](#). From the [Dashboard](#), the Asset Tree to the left is where your folders and all the assets in the system appear.

Clicking on a folder will expand the folder view in the asset tree, revealing the assets and/or subfolder(s) inside. Additionally, clicking on a folder from the asset tree will open it in the main viewing area as well.

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### Formats

In earlier versions of Cascade Server, users were required to learn and employ XSL to transform block, structured data, or XHTML content in a page. With the release of Cascade Server 5.7, it is possible to create a Format, which is a new type of transformation asset that can be applied at the region-level, specifically at the page region-level, page Configuration Set region level, and at the Template region-level the same way that a stylesheet can be applied.

There are two types of formats; [Script Formats](#) and [XSLT Formats](#). The ways in which data is transformed is dependent upon the type of format being used. Please see the specific format pages for more info.

Some of the most common uses for Format Transformations are:

- turn generic XML data into XHTML in order to display it in a web browser
  - add additional formatting and presentation logic
  - re-organize or filter XML data
  - convert from one XML standard to another (XHTML to RSS)
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## **Form Builder**

Cascade Server makes it easy to manage forms from within the business user interface. Cascade Server provides the ability to customize the Form Builder to aid users in easily creating and inserting forms to pages. Forms can include a variety of required and/or optional information such as client names, comment boxes, and email addresses that visitors will see on any page with a form. An example form builder data definition is provided, that can be used to create forms, surveys, and polls, along with the necessary scripting language code to process the form on your server.

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## **G**

### **Graphic User Interface**

A Graphical User Interface (GUI) is a design method that allows the user to view and interact with information via different graphical elements, such as windows, buttons, screens, wizards, etc. Generally, graphical interfaces require the use of a mouse to navigate through the different elements. Currently, Graphical User Interfaces are omnipresent and users rarely encounter a situation where they cannot use one. Both the Microsoft Windows operating system and Mac OS X present information via graphical user interfaces. An example of a non graphical user interface is the command-line interface (CLI) which is found in Windows by using a command prompt, where the user primarily interacts by typing commands with the keyboard. In addition, shells under Mac OS X or Linux operating systems are considered non-GUI or CLI interfaces. Cascade Server is inherently a Graphical User Interface due to the fact that it is a web application. All things viewed through a web browser are necessarily graphical.

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### **Group**

A Group is made up of one or more users with common permissions. Each user in the system must be given membership in one Group, and can be given membership to multiple Groups. Group role membership is passed on to the user, meaning that the user automatically belongs to any roles that are assigned to the group(s) that the user belongs to. This is a convenient and often preferred way to easily change role memberships across groups of users.

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## H

### History Page

From any page in the system, users can click on the 'History' link on the upper menu bar to see a list of their most recently viewed assets. Users may also jump to an asset listed in the history by selecting its system name.

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## I

### Index Block

An Index Block is a special type of block asset that returns a listing of assets from the CMS directory structure in the form of XML data. Assets such as pages, files, folders, external links, and even other blocks can be returned as XML content that describe them. An index block can even return the data content of multiple pages within a directory for use on other pages within the system.

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## J

## K

### Keywords

Keywords are part of the metadata content for pages, files, folders, blocks and external links, and are used by search engines to determine the relevancy of individual pages or sites. Typically, keywords are a comma-delimited list of words used on pages and generated in such a way that the page can receive higher points in a search engine query.

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## L

### Link Checker

The link checker ensures that all pathways from the current asset to other assets in the system are valid, and is invoked after an edit is committed by clicking the '**Submit**' button. If the checker detects any broken links (which includes any relative links, as these are not valid within the CMS), it forwards the user to a page detailing these errors and providing several options for dealing with them.

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### Load Balancing

Load-Balancing is the process by which activity in the system is evenly distributed across a network (multiple application servers) so that no single device/server is overwhelmed.

With the re-architecture of Cascade Server 5.0, users are provided the ability to load balance multiple application servers to reduce downtime and improve performance. This involves running multiple Cascade Server 5 machines behind a proxy, or load balancer; typically this will be Apache. To the end user, the CMS address stays the same; behind the scenes, one of many different application servers will handle each user's requests.

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## Log In Out

Logging in is mandatory for any user wishing to use Cascade Server. Once logged in, a user can access and edit assets inside the system. Upon logout, a user's session will be terminated. If a user wishes to view and/or edit assets inside the system, he or she will have to log in again using their login credentials (username/password).

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## M

### Manager

The Manager role is the second highest [role](#). It has many of the permissions of the highest role, administrator, but those powers are more limited in scope. Generally, the manager role is used to assign administrator-level privileges to a site or sub-site. Since roles are cumulative, managers have all of the powers of the roles beneath them (publisher, approver, contributor) as well as the power to bypass workflow.

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### Menu

A menu is typically the main navigational feature of a website. A menu can show a list of just the main links on a site or several levels of sub pages. A menu can be the same for all pages throughout the site, or it can expand to show more levels the deeper into the site you go.

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### Message

Messages are sent to users by other users, as well as from the CMS, and take a number of forms, including informative reports and requests that the user perform a specific task. They are viewable from the "**Messages**" tab on the dashboard.

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### Metadata

Metadata is data within the CMS that describes an asset. Common fields such as title, summary, or keywords provide quick information about the content contained inside of a particular asset. Because the system manages all assets as XML, the metadata that a user enters for assets can be used for display purposes on site pages. When used in conjunction with index blocks, an XSLT stylesheet can be applied to the metadata to create common HTML content listings such as a listing of recent press releases

including the title and a quick summary of the press release content. Cascade Server uses two types of metadata – wired and dynamic.

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## Metadata Sets

A Metadata Set is a system component that provides the interface for customizing and managing the two types of [metadata](#) fields, wired and dynamic, that can be visible and/or associated with an asset. Metadata Sets are managed in the Administration area of the system.

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## Migrate Existing XML As Structured Content

Cascade Server's Web Services interface exposes to SOAP clients and interface for adding and editing assets. This allows repetitive or difficult tasks to be accomplished easily with any SOAP-compatible programming language. As a demonstration of these features, this guide will walk users through the task of importing many database entries from an old CMS (in the form of an XML dump) into Cascade server with PHP and SOAP calls. Web Services makes this process much quicker than a manual import.

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## N

### New Menu

The 'New' menu is located in the top global navigation bar. It is used to easily create new assets.

If the height of the menu exceeds the browser height, the menu will scroll, and the menu loads with the page to prevent any delay when loading the menu for the first time after a page load. Both of these features work in all [supported browsers](#).

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### New Site Wizard

The new site wizard is a time-saving convenience tool used to setup site-specific [folders](#) and related system [components](#) that otherwise must be created manually. The new site wizard can be used in one of two ways. If building a site completely from scratch, the new site wizard can be used to simply create a site folder structure (based on established best practices), and required site-specific system components. Secondly, if you're importing an existing site into Cascade, the new site wizard can be used to do all of that plus create a [template](#) and [configuration set](#), then import all your pages from a zip file and base them on this new template.

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## O

### Outputs

Cascade Server supports the creation of multiple outputs for content. By setting up additional targets, templates, and configurations for the multiple outputs, Cascade Server can automatically generate and publish multiple versions of the same content. Content need only be updated once, and changes are replicated throughout the additional outputs.

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### Overlibs

When viewing a page in the Layout setting of the View tab, overlibs are the block icons or page icons that appear in the top left corner of each region on a page. They contain links to edit or view different assets. When clicked, they display options that may allow the user to perform the following tasks, depending on what the page or region contains:

- edit page
- edit page inline
- edit stylesheet
- edit block

- or -

- view page
  - view block
  - view stylesheet
- 

## P

### Page

The Page is one of the core [asset](#) types in Cascade. It represents the grouping of several items together including content, [template](#), [blocks](#), and more. Pages are the grouping of these items that a user publishes out to display new web content. Essentially, your 'page' becomes a new web page.

Pages can represent many different types of content on a website. Pages can be frequently asked questions (FAQs), newsletters, press releases, employee profiles, news articles, simple content, and anything else you might find on online.

The system uses pages to dynamically create navigation link menus, site maps, alphabetical indexes, [RSS feeds](#), and many other automated items.

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## Plug Ins

The asset factory plugin framework allows administrators to tie Java plugin classes with certain asset factories. These plugins, configurable through a file named "asset-factory-plugin-config.xml", allow administrators to accomplish certain tasks as users create new assets from asset factories.

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## Preview

Preview is a view in Cascade Server that enables the user to view a [page](#) as it will appear once it has been published. This is very useful in cases when a publish job is about to be performed, or a page edit was recently completed, and the user wishes to verify the absence of possible rendering issues. Once the preview is activated (this is done by clicking on '**Preview**' in the action bar), the final version of the page will appear.

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## Previous Next

Previous/next navigation buttons are a type of [Dynamic Navigation](#) and an easy way to allow visitors to browse through sibling pages without having to keep clicking back to a directory. Clicking through previous/next navigation is much like leafing through pages of a book.

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## Production Server

A Production Server is a web server that delivers what is often called the "live site." It is typically available to the entire web and houses the most recent version of its respective site.

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## Publisher

Publisher is a [role](#) in the system and can be assigned to a [user](#) or a [group](#). The Publisher role allows the same actions as the Contributor and Approver, as well as allows the user to push content out to a live site; either by completing workflow that contains a publish trigger upon completion, or by selecting assets he/she has access to and selecting to publish them.

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## Publishing

Cascade Server features a robust publishing engine designed to bake files out in the development environment, and synchronize those environments with one or more production servers. Assembled content is transformed into native XML files, standard HTML, and/or .NET files (.aspx). Upon the publishing of content, the information is completely decoupled from the CMS, allowing it to operate independently in any standard environment.

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## Publish Queue Reordering

Publish Queue Reordering allows publish jobs that have not yet started to be dynamically re-ordered by [Managers](#) and [Administrators](#) using drag and drop reordering.

A [System Preference](#) (found under the General tab, set by an Administrator) is used to set a minimum role as to who may reorder publish jobs – Manager, Administrator, or none ('none' disables drag and drop altogether). Administrators and Managers may reorder any job in the queue. Administrators continue to be the only users who can cancel publish jobs.

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## Publish Set

A publish set is a group of publishable [assets](#) that is to be published on-demand or on a schedule. They may contain files, folders, and/or pages.

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## Publish Triggers

Publish Triggers are plug-ins that can be utilized during the Cascade Server publishing process. They allow developers to execute custom logic each time an asset (page, file, or other content item) is published.

For example, a publish trigger may be set up so that each time a particular [page](#) is edited and published, an e-mail is sent to notify users (or even non-Cascade users) that may be interested in that page's publication.

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## Q

### Quick Links

Quick Links is a drop-down panel that can be accessed from any page in the system, and can be found in the top right corner of your screen. It provides users with one-click access to frequently used options. This feature serves both as a "site-map" of Cascade Server for users, and also as a means by which to reduce the time it takes to get from Point A to Point B by minimizing page loading and refresh times. Administrative users will have access to more options in the drop-down menu than non-administrative users.

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## R

### Recent Pages

The Recent Pages list is a type of [Dynamic Navigation](#) that makes it simple to present new and important content in a chronological and easily viewable order. There is often a need for a listing and summary of recently added pages. Time sensitive content such as press releases, newsletters, or announcements lend themselves well to this particular type of dynamic indexing.

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## Reference

A reference is a special [asset](#) in Cascade that represents an existing asset in another location; thus, a single asset can appear to exist in multiple locations. While a single asset appears in navigation as if it were in multiple locations, in actuality, it directs back to the original asset.

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## Relative Link

Relative links allow path references to other [pages](#) or [files](#) to be written in a way so that the file can be located by navigating from the current page, as opposed to starting at the root directory and following a long path (an "Absolute Link").

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## Role

In Cascade Server, the abilities of a user are defined by the **Role(s)** to which that user is assigned. Either these [roles](#) may be assigned explicitly through the user management system, or they may be inherited from the [groups](#) to which that user currently belongs. Roles outline the access rights for individual users.

Roles also determine the order in which the [workflow](#) process occurs according to the customization of the workflow process. An Administrator assigns roles. Roles are not inherited according to the workflow process; rather, a user must be given specific roles to contribute to the workflow process (i.e. if an Approver needs the ability to edit content then he/she must be given a Contributor role in addition to the Approver role).

There are five basic pre-defined default roles in Cascade. Starting with the most *basic* user level, they are:

1. [Contributor](#)
2. [Approver](#)
3. [Publisher](#)
4. [Manager](#)
5. [Administrator](#)

With the release of Cascade Server 5.5, custom roles were added to the system, which allows system administrators to toggle the 40+ available abilities for the 5 pre-defined roles with Cascade. With the release 6.0, system administrators are able to create completely new roles with sets of abilities customizable to suit the differing needs of organizations and departments.

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## RSS Feed

RSS, an acronym for Rich Site Summary or Really Simple Syndication, is a useful way to make a list of updated or new information online available in a concise format for other sites and RSS readers. RSS is essentially an XML document with links and metadata conforming to a specific standard.

---

## S

### Save as Draft

New with the release of Cascade Server 5.0, the Save As Draft feature allows multiple [users](#) to save drafts of [assets](#) that they are editing in order to return later to finalize changes. By allowing users to work on multiple assets at once, and permitting users to leave the editing interface without publishing, Save As Draft leads to increased efficiency and a decrease in the constant use of system resources. The ability to periodically save a draft of an edit in progress serves as a valuable safeguard against accidental loss of work due to a browser crash or an accidental click. And since the Save As Draft feature is beneficial system-wide, it's enabled for all users and for all content types.

To access Save-As-Draft, when editing a given asset, instead of clicking submit to update the current version of the asset, click '**Save as Draft**':

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### Scripting Languages

Content from the system can be published as files with any desired file extension. For example, from a single content repository, multiple sites can be managed, each with a different scripting language, such as ASP, ASPX, PHP, CFM, SSI, and JSP. The system supports managing content that is published to multiple servers in a non-heterogeneous environment.

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### Search and Replace

Search and Replace allows users to quickly changes multiple [assets](#) at once. While searching within the CMS, Administrators may choose to replace certain content (words, phrases, etc.) with other content.

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### Site Index

A Site Index is a form of [Dynamic Navigation](#) represented by an alphabetical listing of all [pages](#) on a site. Site indices may also be created for individual sections of a site.

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### Site Map

A Site Map is a type of [Dynamic Navigation](#) that is a comprehensive outline of all [pages](#) on the site. Site maps are typically ordered according to folder structure.

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## Spell Checker

The spell checker, much like the [accessibility checker](#) and the [link checker](#), is invoked after a page edit is committed by clicking the 'Submit' button. If there are any words that the CMS deems suspect, the user is forwarded to a 'Spell Checker' page listing the errors sorted by the field on the page in which they occur. The Spell Checker checks and reports all words (content + metadata) that are not found in the system's dictionary.

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## Staging Server

A Staging Server is a web server used to test the various components of, or changes to a web site before propagating them to a production server.

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## Syndication

Syndication refers to repackaging web content in a way that makes it available for others to display dynamically. The best example of syndication is news sites that rely on Atom, RSS, or simple XML formats to repackage their news headlines.

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## System Preferences

System preferences are managed by users who have the ability to edit system preferences, and are found under the **Tools** menu.

There are four main types of system preferences:

- 1) General Options – allows users to customize basic system-wide preferences
  - 2) Email Options – allows administrator to use email properties to determine how emails are sent from the system
  - 3) Content Options – provide more detailed customization for how the system handles various types of content
  - 4) User Preferences – determine settings unique to the current user
- 

## T

### Target

A Target is a system-asset available in the Global Area used to represent a site or subsite, and it is how a web site is defined. When used system-wide in the [Global Area](#), Targets brings together a combination of [output](#) types (HTML, XML, PDF, etc.), [templates](#) (used to define the 'look and feel' with blocks and stylesheets), a [Base Folder](#) (the core asset repository), and publishing locations (webs servers, etc.). In order to begin creating a new website, a target must first be created.

In versions of [Cascade 5.x](#) and previous, the system used Targets as the organizing principle around which sites were based. With the release of Cascade Server 6.0, targets have been deprecated in favor of the system's new [Sites](#) feature. If you are using a version of Cascade previous to 6.0 and would like more information about

Targets please visit our [past versions Target page](#). \*Please Note - In order to ensure backwards compatibility, Targets will still be available in the Global Area of the system (i.e. - the way you view Cascade now). However, because it is now recommended to organize content using [Site](#) objects, whenever in a particular site in Cascade, Targets will not be available and users will instead only have access to "Site"-related objects, assets, and configurations.

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## Template

A Template is a fundamental system entity that defines the HTML/XML structure of page asset in the CMS. Templates are essentially XHTML documents that contain standard HTML tags and [CSS](#) that create what is commonly referred to as the "look and feel" of a web page.

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## Text Block

Text blocks are basic [blocks](#) of content that can be reused throughout a site much like an [XHTML block](#). Text blocks are not as widely used as their XHTML counterpart, because text blocks lack the standard [WYSIWYG](#) editor contained inside of XHTML blocks that allow for the creation of rich content with images, links, and standard text formatting options.

The text contained by a text block can be plugged into a [page](#) region at three different levels: the template level, the page configuration level, or the page level. When a block is plugged into a page region at the template level, the block content will appear in any pages using that template. Any blocks assigned at the page configuration level will appear in any pages using that configuration.

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## Transport

A site contains a collection of one or many destinations; these destinations define the locations where the site can publish to. The location is defined by the transport associated with the destination, and the transport represents a server location. In other words, whereas a destination defines the link between a site and transport, a transport represents the physical location of a server which can be used for any number of sites. A transport represents both the storage and movement of data concerning how published content is pushed out from the temporary directory and the final physical [server] publish location. Transports can push content out via FTP/STP, or via a file system like a VPN, a mapped network drive, a shared drive, or a mounted drive. To utilize a transport, it must be attached to a destination.

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## U

### User

A **user** in Cascade Server is any individual who uses the content management system. Users of Cascade are defined by their [User IDs](#), [Role](#) designations, and the [Group\(s\)](#)

they belong to. Users can be viewed, edited, or deleted by clicking on the username in the **Administration** area, and selecting the appropriate choices.

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## User ID

User ID is short for User Identification and is also referred to as username. A User ID is a unique, sequence of characters used to identify a user of Cascade Server. User IDs are used to authenticate the [user](#) upon login and for identifying the user for the purposes of logging, access, and resource management. Usernames are chosen upon user creation, and may consist of numbers, letters, and the underscore ( \_ ).

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## V

### Version

Cascade Server maintains a full version history on each asset in the system. As changes are made to any asset in the system, Cascade Server keeps track of the changes in separate copies of the asset called Versions. These are accessible through the **Advanced** tab of any asset in the **Home** area by simply clicking "Advanced" and selecting "Versions" from the drop-down.

The versions list for each asset shows a list of each version, the author for each change, including the original creator of the asset, as well as the time and date of the change and any notes available. Users may navigate through the various versions, compare them with the current version, and activate any version desired.

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## W

### Web Services

Web services provide Cascade Server users with a powerful way to work with the system by providing a very raw interface with which to interact. This interface provides methods to create, edit, read, and delete all assets and components in the software. Additionally, users can also perform publish requests for files, folders, and pages. Finally, any of these operations are able to be wrapped together in a "batch" request for submitting more than one operation in a single request.

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### Web Services Database Migration

Cascade Server's Web Services interface exposes to SOAP clients an interface for adding and editing assets. This allows repetitive or difficult tasks to be accomplished easily with any SOAP-compatible programming language. As a demonstration of these features, this entry will further explain the task of importing many database entries (from an old CMS) into Cascade Server with PHP and SOAP calls. Web Services makes this process much quicker than a manual import.

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## Workflow

When creating web content (a [page](#), [file](#), image, etc.), a workflow is a series of ordered steps that the content must go through to be quality-checked, and either approved, modified, or disapproved by the appropriate user (an [approver](#)) before being publish-ready. Workflows can be customized or created from scratch. Workflows provide Cascade Server users with a customizable, assignable method of assuring that content (any asset) is checked multiple times by multiple users before being published. The resulting diversity of input ensures that content is accurate and presented in a professional manner.

All users may initiate a workflow when creating or editing content. Users assume different [roles](#) in the workflow process according to their system role. A higher-level user, such as an Approver, reviews the content, and either approves it to be sent to the next step in the workflow, or returns it to the user associated with the previous step for changes. After the content has been approved by all users in the process, a Publisher may then publish the content to a live site. Managers and Administrators have the capability to bypass any of these steps anywhere in the workflow process.

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## Workflow Action

A workflow action is a directed path from a source step to a destination step in a workflow; it decides what the system should do next. Multiple actions may lead from one step to other steps, and actions may be enhanced by triggers, which execute other non-workflow related functions.

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## Workflow Trigger

A workflow trigger is a plug-in that enhances an action in the [workflow](#) process by executing code as the transition from a source step to a [destination](#) step occurs. It encapsulates some system logic to accomplish a non-workflow related function.

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## WYSIWYG

WYSIWYG is an acronym for “What You See Is What You Get.” Cascade’s word processing functionality is referred to as the WYSIWYG editor because as its name implies, it allows you to see formatting while editing in your content in the word processor (much like Microsoft Word®).

The word processor, which is integrated in the CMS system, has the same functionality and features you are most likely accustomed to using in a standard editor. The functions available in the WYSIWYG are all available at the top of the editing content window (as with most word-processors), and include:

---

# X

## XHTML Block

An XHTML block is a reusable [block](#) of content that provides a rich word processing ([WYSIWYG](#)) interface for editing content. Unlike the [text block](#) counterpart, an XHTML block allows for a wide range of HTML elements to be created inside of its editing environment extending to items such as images, links, tables, and bullet points in addition to other standard text formatting.

XHTML blocks are particularly useful for fixed regions of content such as headers and footers that need to stay constant among all pages within the site. A single change to one of these blocks will be present across all pages of the site that make use of the block. The basic level of modularity improves the scalability of the website in addition to allowing for easier "quick edits" that cannot be easily performed if the content were to remain in the body of the overall template.

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## XML Block

An XML block is a reusable piece ([block](#)) of content stored as well-formed, static XML. XML blocks are particularly useful when there is a large amount of XML that must be styled and included on one or more pages of a site.

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## XML Feed Block

An XML Feed Block is a [block](#) whose XML content is pulled from a web location. This can be useful when aggregating outside RSS links, or receiving [output](#) from dynamic scripts or web applications that produce XML. This is the main method by which Cascade allows external content to come into the system and be used dynamically within system pages.

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## XSLT Format

An XSLT Format is specific type of [Format](#) that is an XML document written using the eXtensible Stylesheet Language (XSL). XSLTs are used to transform XML documents into other XML documents. Transformations are commonly used to:

- turn generic XML data into XHTML in order to display it in a web browser
  - add additional formatting and presentation logic
  - re-organize or filter XML data
  - convert from one XML standard to another (XHTML to RSS)
-

**Y**

**Z**

### **Zip Archive**

Cascade allows for multiple images to be uploaded at a single time via the Zip archive importer as well as using SOAP-based [web services](#).

An archive is a file that contains other files packaged together. There are many formats that are used to package files in such a manner, the most widely known are probably the ZIP file format (cross-platform) and the Stuffit file format (Mac only). There are many other archive file formats as well. An archive allows a computer user to organize and transfer files easily. For example, Cascade Server allows the user to upload a ZIP archive into the system and then unzip it. This is very useful when uploading multiple files at once, or content for integration: instead of uploading each HTML file and image individually using the [File Override](#) option, they can be packaged into one file, uploaded once, and then the system will unpack it as if each file were transferred individually.

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