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Makers of the Award-Winning Cascade Server content management software

FAQs

General Cascade Server FAQs

- Which Browsers can I use with Cascade Server?
 - o Cascade Server offers full support for all major browsers, including Internet Explorer on Windows and Netscape/Mozilla/Firefox on Windows, Mac, Linux, and Solaris. Safari on Mac is supported for all features except the WYSIWYG editor.
- Can non-technical users create content using Cascade Server?
 - o Non-technical users can easily create new pages using the system's default [asset factory](#). The asset factory is set up by administrators, and includes various types of assets, such as pages, that are already set up with the appropriate templates, stylesheets, and publishing destinations.
- Is Cascade Server customizable?
 - o Cascade Server provides for numerous customization options using our XML indexing model whereby dynamic indices can be generated for any assets in the system, allowing for easy customization and dissemination of content.

We have an API for developing Cascade Server plug-in modules for asset factory triggers and authentication modules. We also routinely develop custom workflow and publishing triggers for clients on request as part of our professional services.
- What happens to our web site when Cascade Server is undergoing maintenance?
 - o Because Cascade Server's architecture functions independent of the web server environment, we can ensure the published content is not affected but either failures or maintenance issues pertaining to the CMS server.
- Does Cascade Server support fail over transfer?
 - o Cascade Server does support fail over transfer between redundant systems. This is a standard function of Cascade Server and comes at no additional price. Included with the license is a backup server instance of the product.
- Does Cascade Server validate content?
 - o Published content is validated to ensure it is in compliance with XHTML XML, and CSS specifications set by the organization. This ensures cross-browser support for published content.

Notification is given any time invalid code (XML, XSL, HTML, etc.) is submitted. The user is required to correct the error before saving changes to an asset.

HTML/XML errors are indicated by line number and the system gives a detailed explanation of the problem.
- Can Cascade Server automatically archive content?

- o The location for storing outdated content is entirely at the manager/administrator's discretion. Specific folders can be set up to house recently expired content and keep it accessible, and content can be moved to a deeper directory after a designated holding period.
- How should content managed in Cascade Server be backed up?
 - o 100% of the content is stored in the database. It is recommended that the database be backed up daily. The CMS should be installed on a backup machine that can be booted if the primary machine goes down. (It should be noted that the web site itself does not go down, even if a backup CMS instance is necessary). Since all of the content is stored in the database, the database is the item to be backed up according to standard database best practices.
- Is content created with Cascade Server accessible?
 - o Content created via Cascade Server is automatically [checked](#) for 508 compliance (for persons with disabilities), and relevant W3C standards are adhered to.

The WCMS enforces the objective items for levels 1 and 2 compliance. This includes ALT attributes for images, summary attributes for tables, and other items. Certain initiatives are subjective, and human intervention is required.

Integrating Cascade with Other Tools

- Does Cascade Server integrate with Analytics?
 - o Cascade Server fully supports the inclusion of tracking code from third-parties and includes numerous examples with it including Urchin (Google), WebTrends, and WebSideStory.
- Can 3rd Party Data be used in Cascade Server
 - o The CMS integrates content from existing data stores via XML feeds and industry-standard [scripting languages](#).

The CMS allows users to consume XML published from third party sources and incorporate that content into one or more pages on their respective sites.

Common scripting languages such as PHP, ASP/.NET, and CFM are readily incorporated into the software to incorporate third party database content.

- Can Cascade Server export XML for other applications?
 - o All content can be exported as XHTML or XML for use outside the system. This allows your organization to migrate content to other third party applications, content management systems, and portals.

XML can also be exported for use in publishing programs such as Adobe InDesign or QuarkXPress. In such a case, XML content is published to a local server and then imported to the preferred design software to populate a pre-designed template. Exporting XML in this way is a great time saver for creating consistent printed and online versions of the same content, such as brochures or handbooks.

- How is content managed with Cascade Server indexed?
 - o All content is tagged with appropriate metadata and the appropriate taxonomies can be defined. This makes the content search engine friendly. Although Cascade Server does not have an external index utility, it integrates with best of breed search engine tools such as Google Mini, Microsoft Index Server, Verity, etc.

- Does Cascade Server integrate with Active Directory?
 - Cascade Server ties into Active Directory and [LDAP](#) in order to provide a single sign-on for end-users.
- Does Cascade Server integrate with Pubcookie?
 - Cascade Server has a pluggable authentication mechanism built-in. LDAP and Active Directory implementations come standard with the product as well as an API to plug-in to other mechanisms like pubcookie. We have experience plugging in with other authentication subsystems. For example, Duke University uses Shibboleth (<http://shibboleth.internet2.edu/>), and as part of their campus implementation of Cascade Server, we plugged it in seamlessly.

Importing an Existing Site / Creating a New Site

- Can I Import an Existing Web Site with Cascade Server?
 - Yes! There are several different ways by which existing content can be brought into Cascade. Most commonly, an existing site is imported via [Zip Archive](#). For more information on similar operations, please see our [Migrate Existing XML as Structured Content](#) and [Web Services Database Migration](#) pages.
- What's the easiest way to create a new site with Cascade?
 - Cascade Server provides a [New Site Wizard](#) which is a time-saving convenience tool used to setup site-specific [folders](#) and related system [components](#) that otherwise must be created manually

FAQs by Concept

A

Accessibility Checker

- What is the 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.
- Is Content created with Cascade Server Accessible?
 - Content created via Cascade Server is automatically checked for 508 compliance (for persons with disabilities), and relevant W3C standards are adhered to.

The WCMS enforces the objective items for levels 1 and 2 compliance. This includes ALT attributes for images, summary attributes for tables, and other items. Certain initiatives are subjective, and human intervention is required.
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Actions

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

Administrator

- What is an 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.
- What skills do I need to administer an implementation of Cascade Server?
 - Cascade Server is designed to be maintained and customized in-house. Knowledge of standard web development items like (X)HTML, CSS, Javascript, and XSL are more than adequate to customize and administer the system.

Advanced Search

- What is an 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.
- Can I search for content in Cascade Server?
 - Cascade Server offers both a [basic](#) and an advanced search function, allowing content to be searched according to content, type, date, author, workflow status, and all metadata values.

Search results are listed with hyperlinks to each relevant asset for ease of navigation.

Global [search and replace](#) is available on the system level, as well as on individual pages as part of the [WYSIWYG](#) functionality.

Advanced Tab

- What is an Advanced Tab?
 - o 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.
- o

Approver

- What is an Approver?
 - o 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.

Asset Archive

- What is an Asset Archive?
 - o 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.

Asset Factory

- What is an Asset Factory?
 - o 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.

Assets

- What is an Asset?
 - o 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.
- Can assets be copied?
 - o All types of content – pages, content blocks, files, etc., can be copied. The copy can be left as an exact clone, or it can be edited as desired. In addition, pointers can be made that syndicate the content of other pages.

Audit Trail

- What is an Audit Trail?
 - o 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.

Authentication

- What is Authentication?
 - o 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.

Available System Tags

- What are Available System Tags?
 - o Cascade Server provides users with additional functionality by implementing proprietary pseudo tags throughout the system.

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Base Folder

- What is the Base Folder?
 - o 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.

Basic Search

- What is the Basic Search?
 - o 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.
- Can I Search for content in Cascade Server?
 - o Cascade Server offers both a basic and an [advanced search](#) function, allowing content to be searched according to content, type, date, author, workflow status, and all metadata values.

Search results are listed with hyperlinks to each relevant asset for ease of navigation.

Global [search and replace](#) is available on the system level, as well as on individual pages as part of the [WYSIWYG](#) functionality.

Block

- What is a Block?
 - o 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)

- Can I call a <system-region> from a block/stylesheet?
 - o This isn't possible as those only get processed when they are in a template. The best thing to do is to include a block and/or page chooser in your data definition allowing you to easily re-use content on the site. This content will appear inline in the resulting XSL and can be transformed by your XSL. Example data definition XML with a page and block chooser:

Breadcrumbs

- What are Breadcrumbs?
 - o 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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Check In and Out

- What is 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.

Components

- What are 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.
- **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.

Configuration

- What is a Configuration?

- o 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.

Configuration Set

- What is a Configuration Set?
 - o 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.

Container

- What is a Container?
 - o Containers are used in the Administration area in place of folders. They are used to organize and limit access to Administration components. These are found on the left column in the Administration user interface.

To create a new container, please follow these steps:

1. Click on **Administration** on the top navigation menu.
2. Click on the component type where you would like the container placed.
3. Click **New Container** on the left side just below the type of component you selected.
4. Follow the steps to create the desired container.

Contributor

- What is a Contributor?
 - o 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.

CSS

- What is CSS?
 - o 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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Dashboard

- What is the Dashboard?
 - o 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.

Database Publishing

- What is Database Publishing?
 - o 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.

Data Definition

- What is a Data Definition?
 - o 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.

- Does Cascade Server offer Structured Authoring?
 - Cascade Server's granular structure allows content types to be created and reused across multiple sites without compromising security. Predefined content types, called [Data Definitions](#) can be easily replicated across sites, using a different style for each.

Different departments, therefore, can post "news" to their own sites, each using the same structured format. These "news" items are automatically formatted in a style appropriate for that department.

Data Definitions can be edited to set certain fields as required. Required fields are marked with an asterisk (*). If a user attempts to edit a Data Definition-based asset without filling in the required fields, an error message is generated specifying which field data is missing.

Cascade Server comes with a number of useful Data Definitions 'out-of-the-box.' These are fully editable by an administrator, including which fields are required. In addition, administrators may specify required formatting for a field, such as ten digits in a 'phone' field. Data Definitions may also be configured to auto-format such fields to ensure consistency.

Destination

- What is a Destination?
 - 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.

Destinations allow the use of the same transport across multiple targets.

The destination points the assets, which are associated with its target, to a particular location that is defined by a transport. Targets can contain multiple destinations and templates.

Dynamic Navigation

- What is 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](#).
- What type of site navigation can be created with Cascade Server?
 - Cascade Server provides for numerous out of box navigation examples, including A-Z index of services, site maps, context navigation menus, bread crumbs, top navigations, previous and next links, and many more.

Deep hierarchical navigation can be achieved in Cascade Server by using multiple index blocks. Index blocks are easily customized to populate links vertically, horizontally, upwards, downwards, or both.

Different templates can be created to include the relevant index blocks for each area of the site.

Because pages in Cascade Server are organized in a simple and straightforward folder structure, one site can contain multiple unique navigational areas.

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External Link

- What is an 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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File

- What is a 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.
- How does Document Management work?
 - Cascade Server is a fully featured web-based document management system. All the management functionality including version control, check in/out, workflow, custom metadata, access rights, and dynamic interaction with other assets are applicable to all documents, files, images, and rich media. Cascade Server's SOAP-based web services API allows for programmatic interaction with all system assets including documents/files for creating, reading, updating, and deleting (CRUD) of these items.
- How does Cascade Server Import Static Files?
 - The integrate folder utility is a useful tool designed to import legacy content. More specifically, its function is to import the main content region of a page and specific metadata values into the Cascade Server database. If you look at the example files located in our [demo.zip file](#), you will see that a main content region has been notated with the following dreamweaver comment

tags: <!-- #BeginEditable "main" --> and <!-- #EndEditable -->. As the Integrate Folder utility parses through the files, it will extract the content contained within this region and place it in the Cascade Server database. If no main content region has been specified, the Integrate Folder utility will import everything within the opening and closing <body> tags. In addition, the integrate folder utility will also extract the following metadata values: Display Name, Title, Summary, Teaser, Keywords, and Description. Once this process has finished the new template can be applied

- Can I edit Images managed by Cascade Server?
 - o A third-party Image Editing applet is available as an unsupported beta release for Cascade Server. With this tool, users may edit images by resizing, cropping, rotating, mirroring, as well as color adjustments.

This is a great time saving feature, enabling users to make edits without downloading and then re-uploading image files. The Image Editing applet works with Internet Explorer 6.0 and 7.0, Firefox 2.0, and Safari 3 browsers.

If you are interested in the image editing applet, please contact [support](#).

- How are Images handled in Cascade Server?
 - o Images are treated like any other [asset](#), and are stored as such. They can be placed in a default image repository, or they can be stored with other relevant content, at the discretion of the administrator. The system provides for custom workflows, access rights, and image manipulation tools.

Uploading an image is done through the asset factory, using the same method used for creating other content items. This method also ensures that the appropriate metadata is included with the image, making it search engine friendly, and 508 compliant for persons with disabilities.

WCMS-managed images can be inserted into a page via the [WYSIWYG](#) editor by clicking on the Insert Image icon. In addition, users with the appropriate access rights may upload images directly via the WYSIWYG editor.

- What file types does Cascade Server support?
 - o Cascade Server supports uploading of any files. Administrators may choose to edit the list of supported file types by defining them in the system options. Additionally, the system provides for custom metadata fields and workflows for different file types.

File Override

- What is a File Override?
 - o 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.

File Upload

- What is a File Upload?
 - o 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.

- How does Cascade Server import Static Files?
 - o The integrate folder utility is a useful tool designed to import legacy content. More specifically, its function is to import the main content region of a page and specific metadata values into the Cascade Server database. If you look at the example files located in our [demo.zip file](#), you will see that a main content region has been notated with the following dreamweaver comment tags: <!-- #BeginEditable "main" --> and <!-- #EndEditable -->. As the Integrate Folder utility parses through the files, it will extract the content contained within this region and place it in the Cascade Server database. If no main content region has been specified, the Integrate Folder utility will import everything within the opening and closing <body> tags. In addition, the integrate folder utility will also extract the following metadata values: Display Name, Title, Summary, Teaser, Keywords, and Description. Once this process has finished the new template can be applied
- How are Files Uploaded into Cascade Server?
 - o Documents and other binary files may be uploaded into the system. Cascade Server is configurable to limit or expand the types of files supported, at the discretion of the administrator.

Under the [base folder](#), numerous folders can be created, each holding a separate site. Each site folder will contain folders with content elements organized by type (such as images and blocks), and folders with pages organized in a logical structure as it would appear in a site map.

Documents, therefore, can be organized in whatever way allows users the easiest and most logical access.

Like other assets, metadata, searching, browsing, versioning, and workflows are all applicable to documents and files uploaded into the system.

Users can be given customized access to upload, edit, view, publish, or delete individual assets, asset types, or directories.

Multiple images can be uploaded at a single time via the Zip archive importer as well as using SOAP-based web services.

Folder

- What is a Folder?
 - o 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.

- How do Folder Access Rights Work?

- o Folder access rights can be a source of confusion for new users to the CMS. Similar to any system that attempts to find a balance between simplicity and complexity, the CMS implements an access rights approach that attempts to address the many contingencies that can arise with designing a permissions scheme for an organization's managed assets.

Cascade Server currently makes use of Unix-style access rights with folder assets which means that there is no way to configure access for separate groups on one folder asset. Each folder may only permit access for one group, a single user, or all users.

For example, suppose there are three groups within the system that require separate permissions policies from one another. Group A needs full read and write access while Group B simply requires read access and Group C needs to be completely locked out of the folder. Access rights in the CMS would allow Group A to edit/copy existing assets as well as create new ones that will reside in the folder, which can be achieved by choosing "Group A" from the "Group" field dropdown list in the Access dialog for the folder and selecting the "Edit/New" radio button. In terms of satisfying the granular requirements for Group B and Group C, an administrator must accept a current limitation with folder access rights. An administrator cannot assign read-only access to an additional group and also lock out another group when specific group access has already been configured as is the case with Group A. Both groups will either need to accept read-only access or both be locked out of the folder since the only other option that the administrator has is to configure the "All Users" field which allows for any user, regardless of their group, to either edit/create, read, or have no access to the folder assets.

The likely decision for Group B and Group C is to permit read access for all users since this will naturally apply to both groups. Although it is not ideal, read access still provides a security measure against unauthorized edits to folder assets by Group B or Group C, since Group A is the only group of users who may create, read, update, or delete assets.

Form Builder

- What is a Form Builder?
 - o 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.
- Can I use Cascade Server to create online Forms?
 - o Forms are easily created by using Cascade Server's form builder. Forms can be customized to include a variety of field types, including text field, radio buttons, drop down menus, or check boxes.

Text fields can be customized to require specific formatting (email address, phone number, zip code, etc.), and will return a customizable error message

to visitors entering improperly formatted data (invalid email address, wrong number of digits, letters instead of numbers, etc.).

When selecting fields to be included in the form, users can select where they want results saved: either sent to email, or saved to the CMS, an Excel file, or an external database. If 'email' is checked, each submitted form will be sent to the user's email by default. If email must be sent to a different address or multiple addresses, this can be changed manually. If 'CMS' is checked, each submitted form will generate a new page in a special folder inside the CMS. If "custom" is selected, users can configure the form to submit information to an external database.

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G

Graphic User Interface

- What is a 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.

Group

- What is a 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

- What is the 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

- What is an 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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K

Keywords

- What is a Keyword?
 - 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

- What is a 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.

- Does Cascade Server generate Search Engine friendly URLs?
 - Search engine friendly, readable URLs are generated automatically according to individual page name and the folder(s) in which it is found. This gives the site a clean and logical structure from the site visitor perspective, as well as makes particular pages within the system easy to find without using the search function. If a user is looking online at the live site and sees a page that needs editing, (s)he will know how to find the page inside the system simply by looking at the URL.
- How do I create Links in Cascade Server?
 - Dynamic link generation is available in Cascade Server using index blocks. These blocks can be included in page templates, and can be customized to order links however the user requires. Bread crumbs and site maps are also easily added.
 - [External links](#), or symlinks, can be created in Cascade Server and are treated as assets in the system. This is useful for including External sites in dynamic navigation menus.
 - Individual links can be inserted into content using the [WYSIWYG](#) 'insert link' function. These can be links to internal assets, or to outside pages. Users may select where the link is opened (new window, etc.)
- Does Cascade Server check for broken Links?
 - All links are automatically checked in the system any time an asset is created, edited, or published. In the case of a broken link, an error message is generated, and users are prompted to correct the link before submitting changes.

Load Balancing

- What is 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.
- Does Cascade Server support Load Balancing?
 - Cascade Server supports load balancing architectures on the web server implementation at no additional cost.

Log In and Out

- What is Log In and Out?

- o 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

- What is a Manager?
 - o 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.

Menu

- What is a Menu?
 - o 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.

Message

- What is a Message?
 - o 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.

Metadata

- What is Metadata?
 - o 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.

- Does Cascade Server include Metadata for content?
 - o Metadata fields such as title, author, [keywords](#), date created, and summary are available for all content types. Different content types (press releases, news items, individual department pages) can have different default metadata values. Fields may be designated mandatory as desired, and keywords can be selected by setting up a keyword bank if desired. In addition to the standard Metadata fields, additional fields may be added for any content type.

Metadata Sets

- What is a Metadata Set?
 - o 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.

Migrate Existing XML As Structured Content

- What is Migrating XML as Structured Content?
 - o 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 Site Wizard

- What is a New Site Wizard?
 - o 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

- What is an Output?
 - 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.
- Can Cascade Server repurpose content for multiple Outputs?
 - Cascade Server allows for content to be output in Printer Friendly or .PDF format. The CMS will automatically produce these versions using standard XML transformations via XSL, and are an available viewing option for site visitors.

WML for hand-held or mobile access is an available content output format. The CMS will automatically produce WML using standard XML transformations via XSL.

Overlibs

- What is an Overlib?
 - 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

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P

Page

- What is a 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.

- What happens if I move a page to a different folder inside Cascade Server?
 - o URLs are defined by the folder location inside the system. For example, if www.hannonhill.com/news/2005/updates.htm were moved from the 2005 folder to the 2006 folder, the URL would now be www.hannonhill.com/news/2006/updates.htm. The system itself automatically updates all links throughout the system.

When a page is moved and a URL is changed, however, links outside the system (on other websites or bookmarked in visitors' browsers) will still link to the old address. To resolve this issue, Cascade Server allows 'redirects.' A redirect is stored with the asset, and simply tells the system that when someone tries to navigate to the old URL, it will automatically redirect their browser to the new location.

Plug-Ins

- What is a Plug-In?
 - o 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.

Preview

- What is a Preview?
 - o 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.
- Can I Preview Pages in Cascade Server?
 - o The primary way to view a "[Preview](#)" of a page, is to go to the page itself (in Cascade Server), where the default 'View' is the Preview mode. Users can jump from the 'View' tab, to the 'Edit' tab, and so forth. Once changes are submitted for a page, it will also appear in the system as it will when published. Pages can also be previewed in a new browser outside of the system by accessing the Staging area.

If further changes are needed, the user may edit the page again before publishing, or use version control to revert to the previous version.

Previous/Next

- What is 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.

Production Server

- What is a 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.

Publisher

- What is a 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.

Publishing

- What is 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.
- Can Cascade Server automatically Publish and Retire content on a Schedule?
 - All content can be posted and expired at predetermined times. When creating or editing a page, users may simply edit the metadata fields indicating the start date, expiration date, and which folder (if any) the content should be moved to upon expiration.

This is a great way to automate the management of time sensitive information. Coming events, for example, can be automatically removed after the event has passed.
- Can I schedule content to Publish at a later date?
 - Publishing can be [triggered](#) manually, through a workflow step, or on an automated schedule. Publish and expiration dates can be added to all content. If an expiration date is added, the user also has the option of selecting an archive folder that the page should be moved to upon expiration. This can be done at the content item level and at the collection (folder) level.
- How does Cascade Server tie into a Web Server?

- o Cascade Server has a robust publishing engine designed to bake the files out in the development environment, and synchronize those environments with one or more [production servers](#). The assembled content is transformed into native XML files, standard HTML, and/or any scripting language desired. The strength of this system is that upon publishing of content, the information is completely decoupled from the CMS, allowing it to operate independently in any standard environment. Single points of failure such as database connections and third party servers are mitigated as the content has been “compiled.”
- How does Cascade Server support Secure Publishing?
 - o Cascade Server supports secure publishing through the use of industry standard secure transport methods such as SFTP, and VPN. The organization may also implement the secure transfer utility of their choice.
- Can Cascade Server be used with Multiple Web Servers?
 - o Cascade Server supports secure publishing through the use of industry standard secure transport methods such as SFTP, and VPN. The organization may also implement the secure transfer utility of their choice.

Publish Triggers

- What is a Publish Trigger?
 - o 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

- What is a Quick Link?
 - o 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

- What is a Recent Page?
 - 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.

Reference

- What is a 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.

Relative Link

- What is a 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").

Role

- What is a 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 roles in Cascade. Starting with the most *basic* user level, they are:

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

- What is the function of roles in Cascade Server?
 - 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. The default roles include Contributor, Approver, Publisher, Manager, and Administrator. 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 (s)he must be given a Contributor role in addition to the Approver role.)
- How are Access Rights assigned in Cascade Server?
 - Permissions are granular in nature and can be customized as needed. Access to content can be granted at the site, folder, content type, page, or block level, and can be given to an entire group, or an individual user, as desired. Access controls can even be implemented on individual fields within a page data structure.

Access can be granted to view, edit, or publish various assets or areas of the site. Other permissions including create, copy, move, and delete can be controlled via custom workflows outlining additional rules.

RSS Feed

- What is an 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.

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S

Scripting Languages

- What is a Scripting Language?
 - 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.
- Does Cascade Server support Server-Side Includes?
 - Cascade Server supports the use of server-side includes (SSIs) and can push out the files and necessary includes to the [destination](#) servers.

Search and Replace

- What is 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.

Site Index

- What is a 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.

Spell Checker

- What is a 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.
- Does Cascade Server include a Spell Checker for content?
 - Cascade Server provides a [spell checker](#) for all content, including [metadata](#), [block](#) content, and [WYSIWYG](#) content. When content edits are submitted, a spell checker window opens showing misspelled words, and options for resolving them. Spelling suggestions are given, as well as the option to add words to the user's custom dictionary.

Staging Server

- What is a 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.

Stylesheet

- What is a Stylesheet?
 - An XSL Stylesheet is written with a set of rules defined by the eXtensible Stylesheet Language, and is used to transform data from an XML document into an XML document that can be presented in some meaningful manner.

In Cascade Server, XSL stylesheets are assigned to specific regions on a page along with a block (XML, XML Feed, or Index) to style the XML content from the block in a manner appropriate for that page. By using different stylesheets on different pages, the same XML content can be customized for multiple purposes.

Syndication

- What is 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.

System Preferences

- What is a System Preference?
 - System preferences are managed by the administrator, 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

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T

Target

- What is a Target?
 - A target is used to represent a site or subsite, and it is how a website is defined. It 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 (web servers, etc.). In order to begin creating a new website, a target must first be created.

Template

- What is a 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.

Text Block

- What is a Text Block?

- o 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.

Transport

- What is a Transport?
 - o A transport stores (and moves) data concerning how published content is pushed out from a temporary directory to the final publish location. They 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

- What is a User?
 - o 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.
- How many Users can Cascade Support?
 - o Cascade Server supports an unlimited number of content authors.
- How does Cascade Server support Multiple Users?
 - o Cascade Server allows many users to access the system at any given time.

To avoid duplicate versions of content, only one user at a time is allowed to edit a given asset.

Assets are automatically checked out when edits are made, and will remain checked out until the appropriate workflow has been completed.

Content is checked out manually by a user upon clicking the checkout link, and will remain checked out until checked back in by the original user, or the lock is broken by an administrator. Other users are shown which user has checked out the asset, and are given the option to send a message requesting that it be checked back in.

When an asset is in a workflow process, it is automatically checked out to the appropriate user for each step, and cannot be edited before that user had taken the appropriate action.

- Does Cascade Server track User actions?
 - o Cascade Server offers an [audit trail](#) accessible through the Administration area. This feature offers a comprehensive list of all actions having taken place by all users in the system. Users can view the audit trail for a specific user or group, and access any relevant asset by following the included hyperlink. The audit trail covers all editing, approval, and publishing actions and includes identities and timestamps for each.

User ID

- What is a User ID?
 - o 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

- What is a Version?
 - o 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.
- Does Cascade Server save version history for content?
 - o Cascade Server maintains a full version history on each asset in the system. 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

- What is a Web Service?
 - 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.

Web Services Database Migration

- What is 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.

Workflow

- What is a 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.

- How does Cascade Server handle Workflows and Approvals?
 - The workflow engine is fully customizable to include steps such as submit, approve, and publish. A variety of triggers and actions can be associated with each step in the workflow. The built-in visual workflow builder allows for the

creation and management of any type of workflow assigned to any number of users or groups, and unlimited levels of approvals and routing.

A workflow can have an unlimited number of reviewers. They cannot, however, all access the item at once. To avoid the confusion of creating multiple drafts of the same item, workflows progress from one person or group to the next in an organized, predefined manner. Once a workflow has been initiated, only an administrator can edit or cancel the process.

Workflows can be applied at the page or content block level by selecting the appropriate workflow at time of creation, or by editing the workflow selections to a specific page. For pages that are composed of multiple content regions, each region or block can have individual workflow options attached to it.

Because workflows are selected at creation from a set of administrator-defined options, users can be granted the option of bypassing workflow, provided this option has been included on the page or folder level.

- Is there a way to validate Workflow and Data Definition XML outside of Cascade Server?
 - o The following XML schemas can be used to accomplish this: [Data Definition Schema \(XSD\)](#) [Workflow Definition Schema \(XSD\)](#) Please right click on the above link and save to your local hard drive.
- How are Workflow notifications and messages handled by Cascade Server?
 - o Workflow notifications may be received in three different ways, and can be customized according to each user's personal preferences. Upon login, users are greeted by a personalized [dashboard](#), displaying any pending workflows. This dashboard acts as a home screen, and is easily accessible at all times while working inside Cascade Server. In addition, users and groups can be notified via email. Direct actions can be made from within the email via personalized hyperlinks to the system.

A unique feature of Cascade Server is the dashboard [RSS feed](#). Users wanting immediate notification, but who do not want to clutter up their email inboxes can opt for an RSS feed, accessible through any standard RSS reader, listing all relevant workflows as they are generated. RSS entries hyperlink to the specific actions in the system.

Workflow Action

- What is a Workflow Action?
 - o 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.

Workflow Trigger

- What is a Workflow Trigger?
 - o 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.

WYSIWYG

- What is a 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:

- Can I select which formatting options appear in the WYSIWYG editor?
 - The [administrator](#) has full discretion over which WYSIWYG features appear for certain users or groups. This is important for ensuring consistency of style throughout the site, as well as creating a simple environment for less tech-savvy users.

Formatting options can be limited at the system level by going to system options and turning off the features that are not desired. Specific features that can be shut off include text formatting, font selection, HTML toggle, etc.

Different formatting limits can also be placed on different content types, as well as individual assets of the same content type. This is generally setup by administrators/managers at the configuration level, and is useful in maintaining uniformity and consistency for specific areas of a site.

CSS styles can be selected from a drop down menu of a user-supplied stylesheet. This ensures branding standards are consistently enforced throughout the site.

- Can I edit the HTML directly from the WYSIWYG editor?
 - Users wishing to edit content in HTML may click on the HTML icon inside the WYSIWYG. To return to the WYSIWYG view without submitting changes, the user may turn off the HTML view by clicking the icon again. This is a valuable feature for technical users who feel more comfortable working in the HTML environment. This feature can be turned on and off at the content type.

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XHTML Block

- What is an 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.

XML Block

- What is an 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.

XML Feed Block

- What is an 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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Zip Archive

- What is a 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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