Cascade Server and Web Guidelines TechTalk

Nov. 5, 2008
Why We’re Here

• Introduce you to Cascade
• Discuss your needs for the service
• The new “general use” template
• Look under the hood
• Account provisioning
• Training, community
• *Not* for formalized training
Getting Started

- UTS has been reorganized
- Web team part of Integration dept.
- Cascade formally supported UTS service
  - In early phase of service deployment
The CMS Initiative

- Driven by need for CMS to support new Homepage, news, strategic plan, campaign sites
- Cross-functional team from ECG, SOM, SPH, College, UTS
Why Hannon Hill?

- Focus on higher education clients
- Strong support
- Glowing recommendations
- Local company
- “Right fit” product
What is Cascade?

- Web Content Management System
- Designed for site templating, easy content updating
- Entirely browser-based
- “Push” publishing
Cascade Features

- Workflow
- Permissions
  - Multilevel group perms
- Content sharing
- Import of Dreamweaver templates
- WYSIWYG editing (TinyMCE)
- Content expiration
- Version control
- Customizable metadata
- Structured data input
- Content drafts
- Link checking
- Automatic Navigation
Limitations

- Cascade designed for publishing of static pages
  - *Can* publish .php or .cfm pages, but not made for a dynamic site
- Roles are currently fixed
- Authoring and administering site requires training
  - XML/XSL at the heart of everything
- Permission model can get complex
Service Level

- UTS will be supporting:
  - Accounts
  - Provisioning
  - Standard template deployment
  - Publishing to UTS Web Hosting environment

- Custom development is best-effort support
Architecture

- Two load-balanced nodes fronted by F5
- All traffic is SSL-encrypted
- Cascade runs atop Tomcat
- LDAP-authentication (ldap-proxy)
- Oracle General RAC
Permissions

- All permissions assigned at group level

- Group types
  - Contributors
    - Can add and edit content and start workflows
  - Approvers
    - Can approve or edit content in a workflow
  - Publishers
    - Can publish content to a site
  - Managers and Administrators
    - Not generally going to be provisioned
New “General Use” Template
The Plan

Emory University's core purpose is to create, preserve, teach, and apply knowledge in the service of humanity.

Emory’s Where Courageous Inquiry Leads! 2005 - 2015 Strategic Plan provides a means to build upon the university’s strengths and create a vibrant future. The goals and strategies expressed in the plan will allow Emory to achieve its vision of becoming a destination university, internationally recognized as an inquiry-driven, ethically engaged, and diverse community whose members work collaboratively for positive transformation in the world through courageous leadership in teaching, research, scholarship, health care, and social action.

Based upon this strategic plan, Emory will secure and direct resources, take action, and measure progress. Emory is committed to the strategic planning process which turns shared vision into action by grouping a course for growth and development. The plan is built upon the aspirations of all students, faculty, and staff that intersect in a common set of goals and key University-wide priorities.

Emory has identified four strategic goals:

- Emory has a world-class, diverse faculty that establishes and sustains preeminent learning, research, scholarship and service programs.
- Emory enrolls the best and brightest undergraduate and graduate students and provides exemplary support for them to achieve success.
- Emory’s social and physical environment enriches the intellectual work and lives of faculty, students, and staff.
- Emory is recognized as a place where engaged scholars come together in a strong and vital community to confront the human condition and experience and explore 21st-century frontiers in science and technology.

The first three goals reflect the core elements of how Emory will achieve its vision -- strengthening faculty distinction, preparing engaged scholars, and creating community-engaging society. The last goal focuses on what Emory will contribute to local, national, and international communities through inquiry focused on the tough issues facing society and by developing cutting-edge programs focused on leading research, scholarship, and social action.
New Web Guidelines

• “Emory websites should reflect the brand of the parent institution by looking and feeling as if they are key building blocks in a united Emory. Achieving this end involves careful use of color and logos, certainly. However, of equal importance are the quality and relevance of the content, an attractive and logical layout, and ease of navigation. These elements, in combination, constitute the Emory brand experience.”

• “All Emory websites must include a prominent and clear rendering of one of the University’s primary logos, should use Emory blue (see below) as the predominant color, and should feature compelling photography. Having these elements in common does not mean that all Emory websites will look alike. Within the requirements discussed here, much creativity and distinctiveness can be achieved.”
New Web Guidelines

HOW TO CREATE A BRAND-COMPLIANT WEBSITE

• Choose the option most appropriate to your situation:
  1. Use the templates in the CMS.
  2. Design your own website following the brand guidelines.
  3. Temporarily retrofit your existing website by adding a brand-compliant banner to the top of each page, with the idea of bringing the website into full brand compliance at the next redesign or within one year.*
New Web Guidelines

HOW TO CREATE A BRAND-COMPLIANT WEBSITE

Option 2

“Design your own website following the brand guidelines. Submit your website for approval to the web office at theweb@emory.edu at the draft stage and again at the final design stage.”
New Web Guidelines

HOW TO CREATE A BRAND-COMPLIANT WEBSITE

Option 3

Temporarily retrofit your existing website by adding a brand-compliant banner to the top of each page, with the idea of bringing the website into full brand compliance at the next redesign or within one year (October 2009), whichever is sooner. The minimum requirements for the banner are an Emory blue background with an Emory University or school logo at the upper left in white, and including the required University navigational elements at the top or bottom of the page. Provide a link back to the University home page from the University logo in the blue banner at the top.
New Web Guidelines

HOW TO CREATE A BRAND-COMPLIANT WEBSITE

- Emory Blue Banner.
- Logo top left.
- Appropriately-sized official, identity mark with link to www.emory.edu.
- Clear space around logo.
- Logo is dominant element in banner.
- The official logos are federally licensed trademarks. Do not type the logos! Don’t use “EMORY” in uppercase serif type.
- The Emory shield may be used as a background image or graphic element on web pages only when there is a clear and proper rendering of the shield elsewhere.
- The appropriate typeface for most content on an Emory site is the sans serif Verdana, preferably in web color #333333 where possible. The link rollover state should be web color #4040b3 with underline. Times Roman is an acceptable serif typeface for use in major headings if desired.
New Web Guidelines

HOW TO CREATE A BRAND-COMPLIANT WEBSITE

- Emory blue is web color #002878 and should be the predominant color on each web page.
- The secondary color, Emory gold, is web color #CC9900.
- Recommended secondary colors may be used as well. These colors can be found in the Emory visual style guide available for download from identity.emory.edu.
- Avoid colors that represent other institutions—e.g., Harvard red, Duke blue, University of Georgia red and black.
- Other blue and gold colors that are not Emory colors should be used cautiously and never in the banner.
New Web Guidelines

HOW TO CREATE A BRAND-COMPLIANT WEBSITE

Other requirements:

• Include the required University navigational elements—Home, Contact Emory, Emergency, Careers, About This Site—at the top or bottom of each page.

• Include the following copyright text, “© Emory University [year]. All rights reserved.”
XML/XSLT

- Cascade sites built almost entirely with XML/XSLT
  - Templates
  - Stylesheets
  - Workflows
- New version with support Apache Velocity
Do you have a **Bright Idea** that will save Emory time, money, or improve work life?

Can you identify strategies that will make Emory more efficient or effective?

Employee talent and expertise are an invaluable asset at Emory. We're looking for problem-solving ideas best created through the imaginations of our employees. You know your job better than any outside expert so if you have an idea for a new initiative or a solution to a workplace challenge, big or small, we want to hear about it.

Emory is focused on providing the highest quality work processes and improving the lines of communication. Our success depends on your input and participation. Let us know how we can:

- Improve working conditions
- Increase efficiencies
- Save time and money
- Boost workplace productivity
- Streamline administrative processes
- Increase safety
- Enhance customer service

The Bright Ideas program started as one of the initial project charges from the Emory Excellence Through Leadership (ETL) program in 2006. One of the ETL teams was assigned innovation as their goal for the program. The team took the initial concept, conducted research and benchmarking, developed the Bright Ideas approach, and formally launched the program in November 2007.

Please keep this valuable initiative moving forward by submitting your innovations throughout the year.

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Ask a Question
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Cascade Vocabulary

- Templates
  - XML documents that describe the regions that make up page
- Blocks
  - A “pluggable” piece of content that can be swapped out; can be dynamic
- Stylesheets
  - XSLT document to transform XML into HTML or manipulate or filter XML
Cascade Vocabulary

• Targets
  – Connects template, output format, base folder, publishing location

• Destinations
  – Connects target to transport method

• Transports
  – Cascade can connect to FTP or SFTP
Cascade Vocabulary

• Asset Factories
  – Copies of objects used as template for new ones

• Data Definitions
  – Can enter content as unstructured data
    • For example, course atlas, faculty bio, etc.

• Publish Sets
  – Can trigger sets of pages to publish either on a schedule or on a defined group of pages
Next Steps

- Accessing Cascade
- Documentation
- Vendors
- Training
- Community
Requesting an Account

- Remedy form at help.emory.edu
- Training required
- Account will be created in production and dev instances
- All accounts must be in LDAP
Documentation

- [http://www.hannonhill.com/new-kb](http://www.hannonhill.com/new-kb)
- [http://it.emory.edu/cascade](http://it.emory.edu/cascade)
- Cascade Wiki in Blackboard
Accessing Cascade

- [http://cascade.emory.edu](http://cascade.emory.edu) is production
- [http://dev.cascade.emory.edu](http://dev.cascade.emory.edu) is sandbox
  - Self-signed cert
  - Not an easy migration into production
Provisioning

- Users can request
  - Blank, empty site
  - Site configured with standard template
  - Import of existing static Dreamweaver site
    - You zip it, we import it
Hannon Hill Professional Services

- UTS is working with HH to create several tiers of fixed-price packages and standard hourly rate
- Good documentation
- Standard methods for implementation
Training

• Contributor Training
  – By Emory Staff
• Administrator Training
  – By Hannon Hill
  – Available in January; more people = lower cost
Hannon Hill User Group Meetings

• Every third Wednesday at 2 p.m.
Cascade ListServs

- cascade-announce
- cascade-discuss
- Cascade Users’ Wiki
  - Code sharing
  - Best Practices
  - Community
    - http://classes.emory.edu
    - Will be provisioned with account
Questions?

• What do you need from us?
• What do you need from the template?
• What gaps do you see?