

Uploading a Document

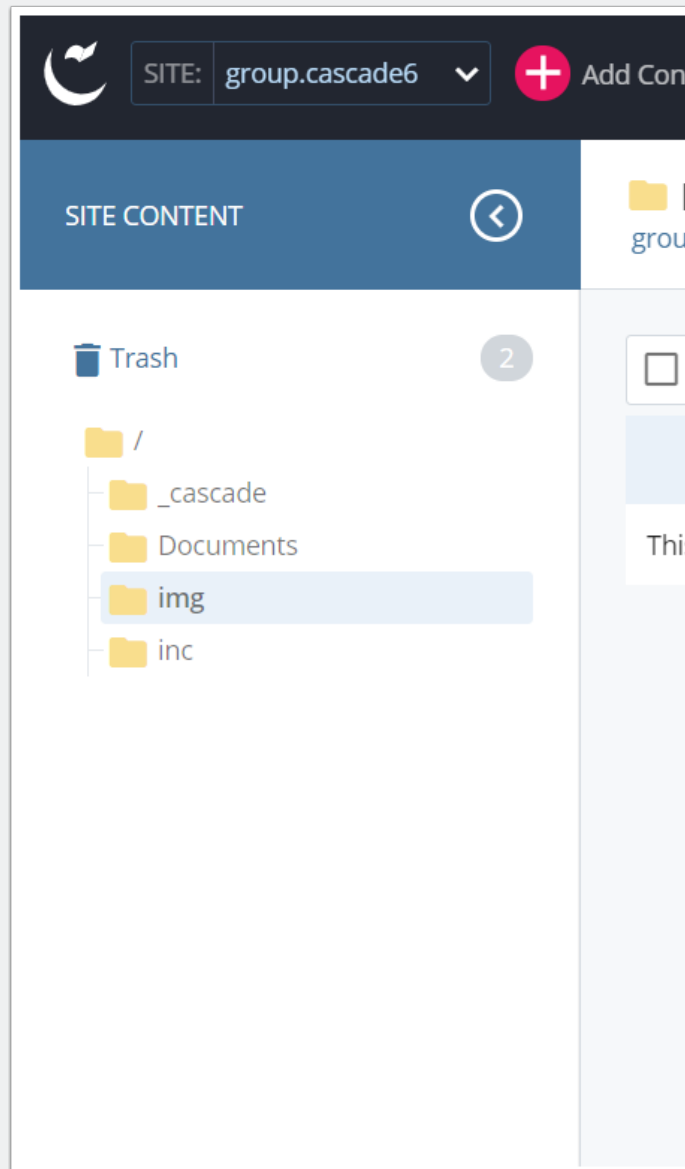
1. Document Types

There are several types of documents that you can upload to your site. The most common files would be Microsoft Word (.doc, .docx), Adobe PDF (.pdf) or Microsoft Excel (.xls, .xlsx).

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2. Documents folder

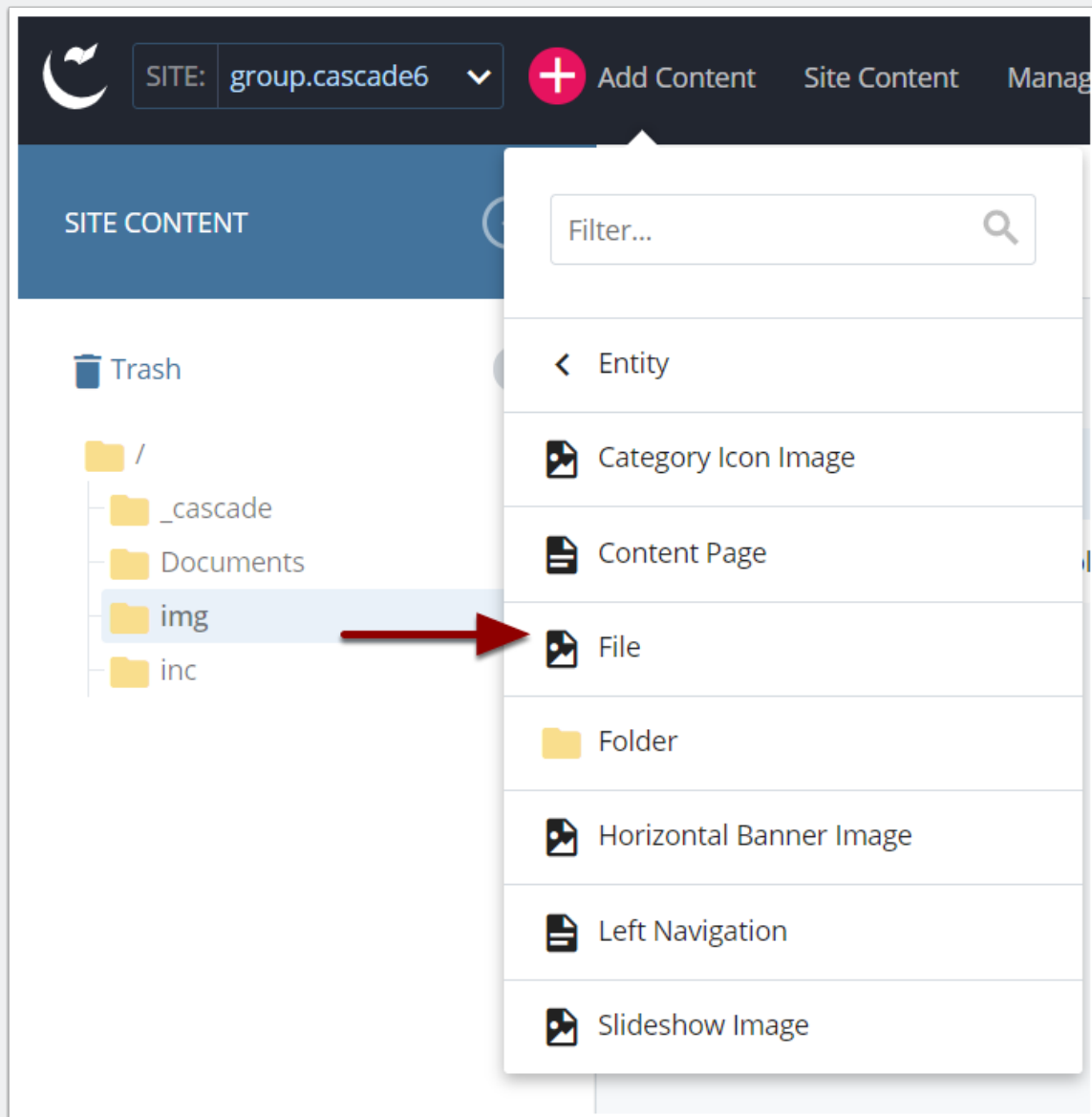
If you do not already have a documents folder you should create one. It is best to keep all similar content organized within your website.



Uploading a Document

3. Uploading a Document

To upload a document, from the menu bar click on New -> Entity -> File.



Uploading a Document

3.1 System Name

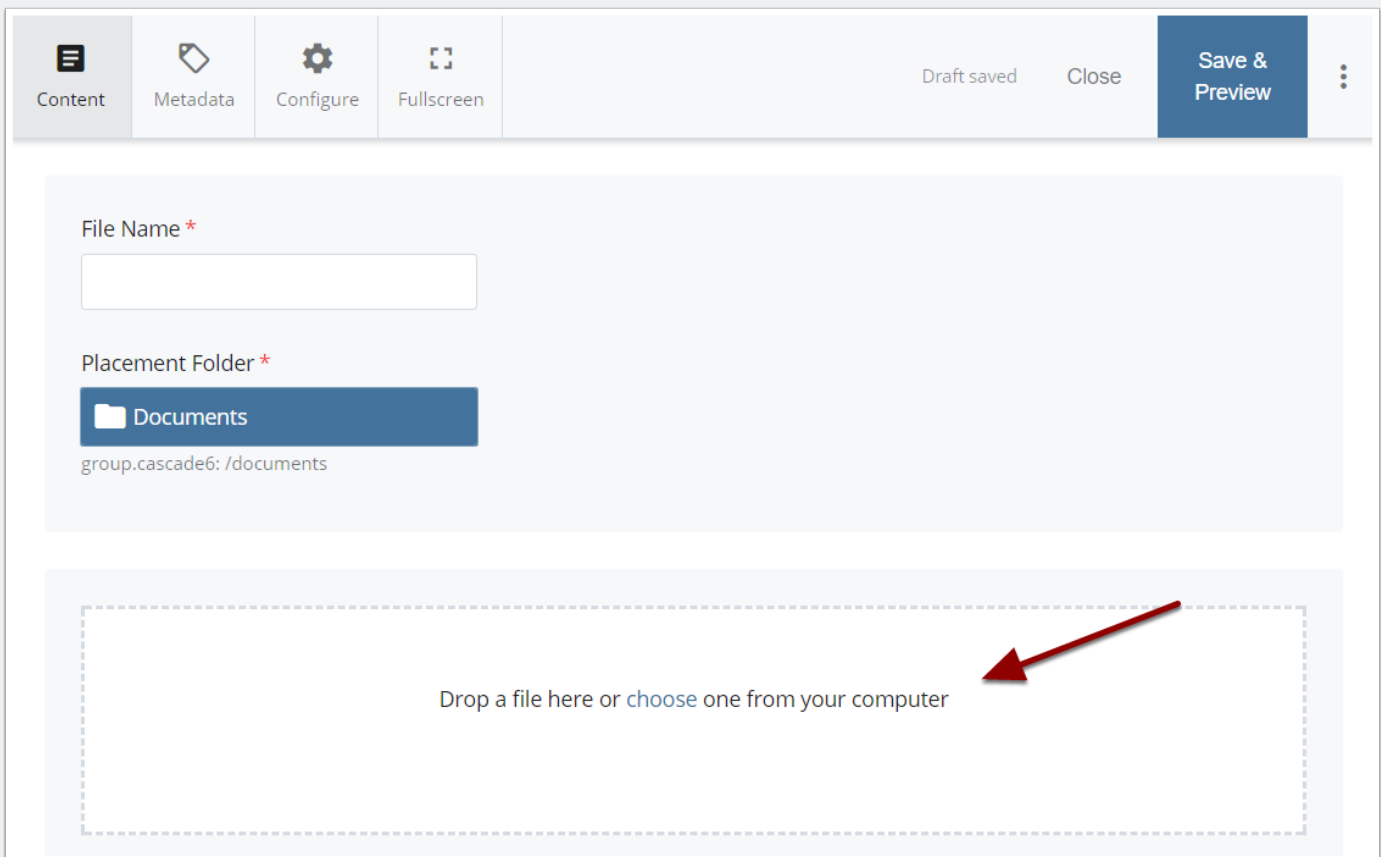
The first item for you new file is the system name [1]. It is best to leave this blank. Cascade will take the name of the file and use that for the system name. If you did type in a name you **must** use the file extension (i.e. **sample.pdf**). By leaving the box blank Cascade will also add the correct extension. Also, make sure that the parent folder is set to documents [2]. If it is not, click on the magnifying glass to search for the correct folder.

The screenshot shows the Cascade document upload interface. At the top, there is a navigation bar with four tabs: 'Content', 'Metadata', 'Configure', and 'Fullscreen'. To the right of these tabs, there are three buttons: 'Draft saved', 'Close', and 'Save & Preview'. The main area of the interface is divided into two sections. The first section contains two form fields. The first field is labeled 'File Name *' and has a red circle with the number '1' next to it. The second field is labeled 'Placement Folder *' and has a red circle with the number '2' next to it. The dropdown menu for the second field is open, showing 'Documents' as the selected option. Below the dropdown, the path 'group.cascade6: /documents' is visible. The second section of the main area is a large dashed box containing the text 'Drop a file here or choose one from your computer'.

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3.2 Choose File

Use the Choose File button to browse your computer for the file you want to upload or drag it to the dashed-lined box.

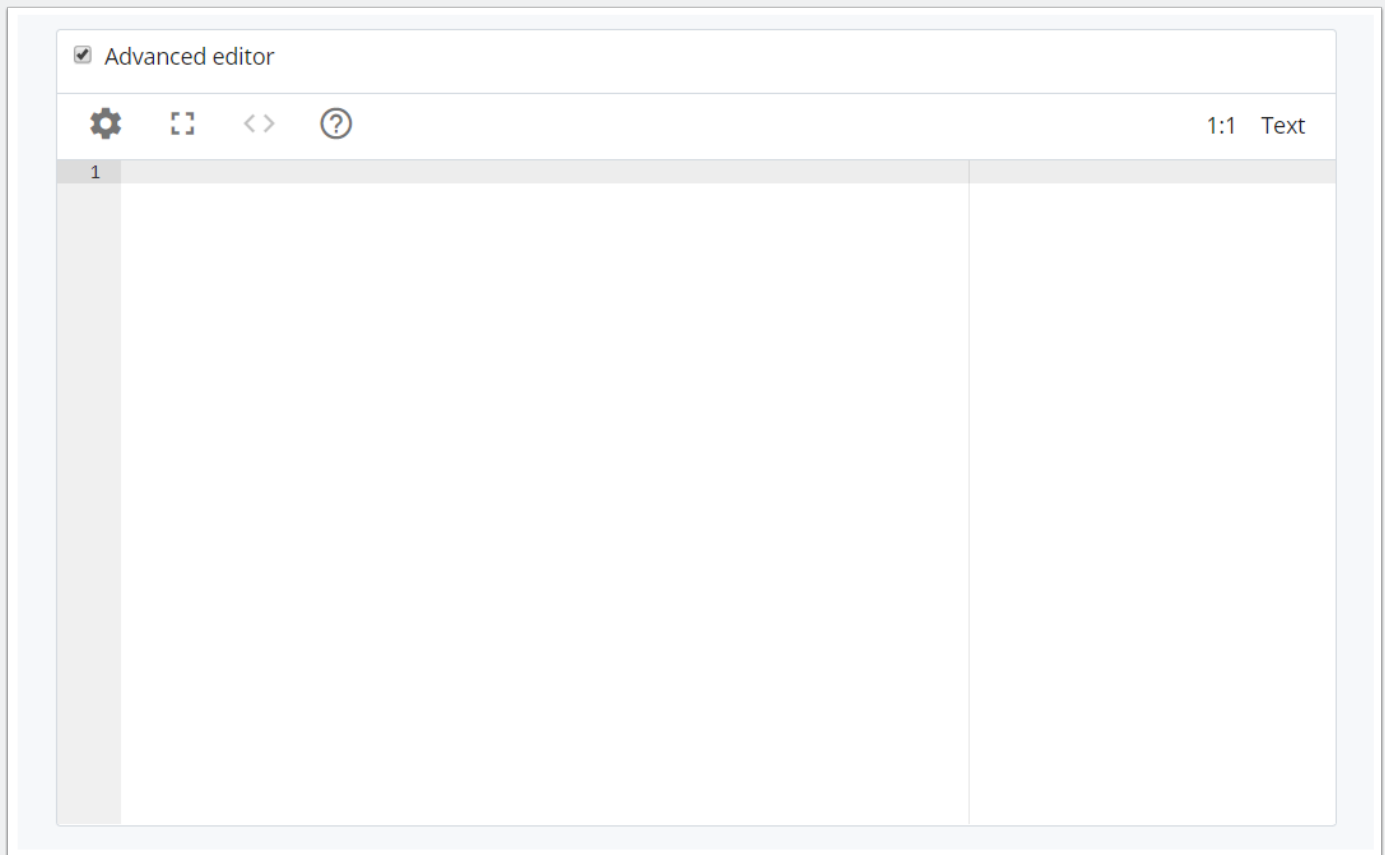


The screenshot shows a document management interface. At the top, there is a navigation bar with tabs for 'Content', 'Metadata', 'Configure', and 'Fullscreen'. To the right of these tabs are the labels 'Draft saved' and 'Close', followed by a blue 'Save & Preview' button and a vertical ellipsis menu icon. Below the navigation bar, the main content area is divided into two sections. The upper section contains a 'File Name *' label above an empty text input field, and a 'Placement Folder *' label above a blue button labeled 'Documents'. Below the 'Documents' button, the path 'group.cascade6: /documents' is displayed. The lower section is a large dashed-lined box containing the text 'Drop a file here or [choose one from your computer](#)'. A red arrow points from the right side of the dashed box towards the 'choose one from your computer' link.

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4. Edit File Contents

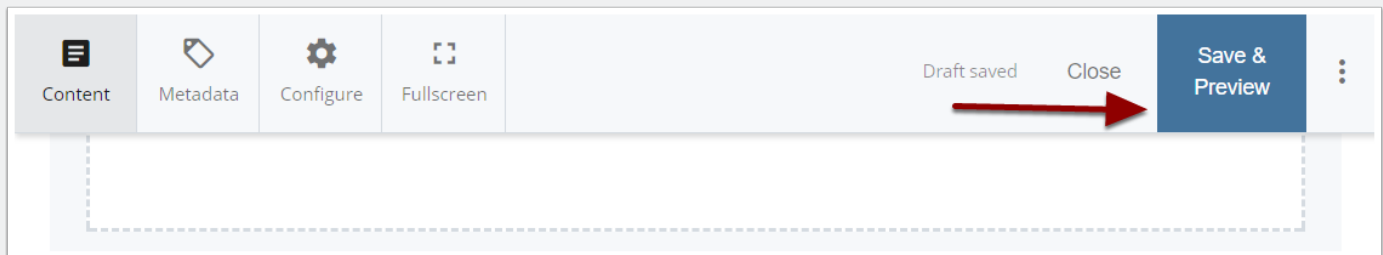
If you are uploading an existing document, you can leave this area blank.



Uploading a Document

4.1 Submit

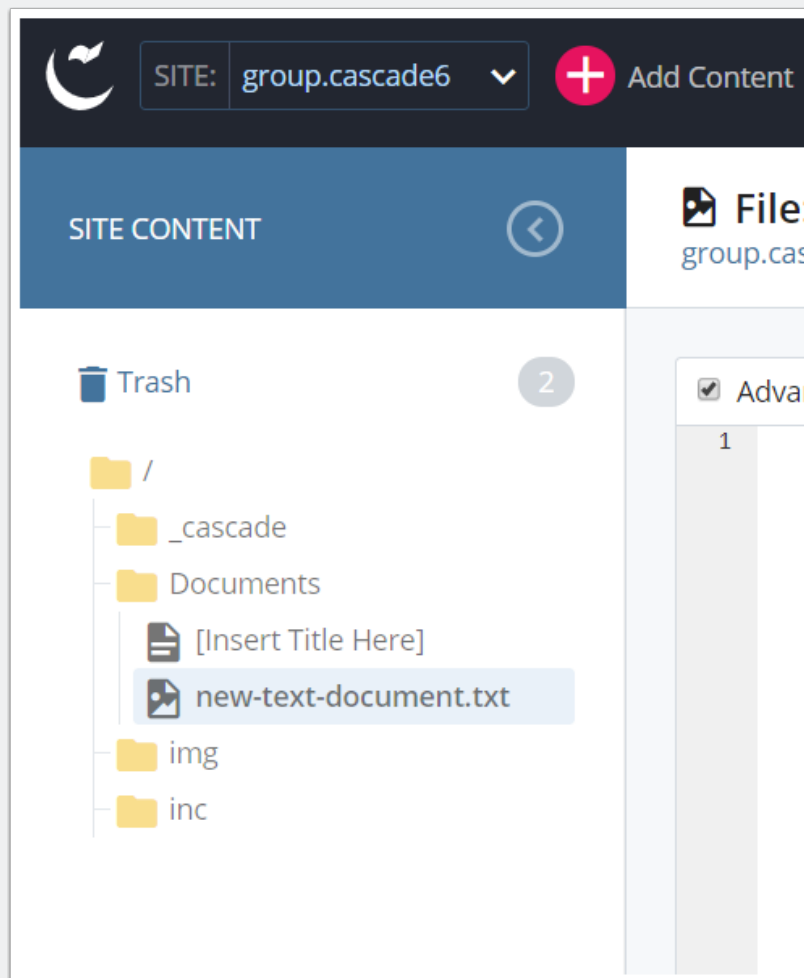
Once the file has been selected, click on Submit to upload the file. Cascade may open a text editor after submitting the file, you must save and submit changes as well.



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4.2 Asset Created

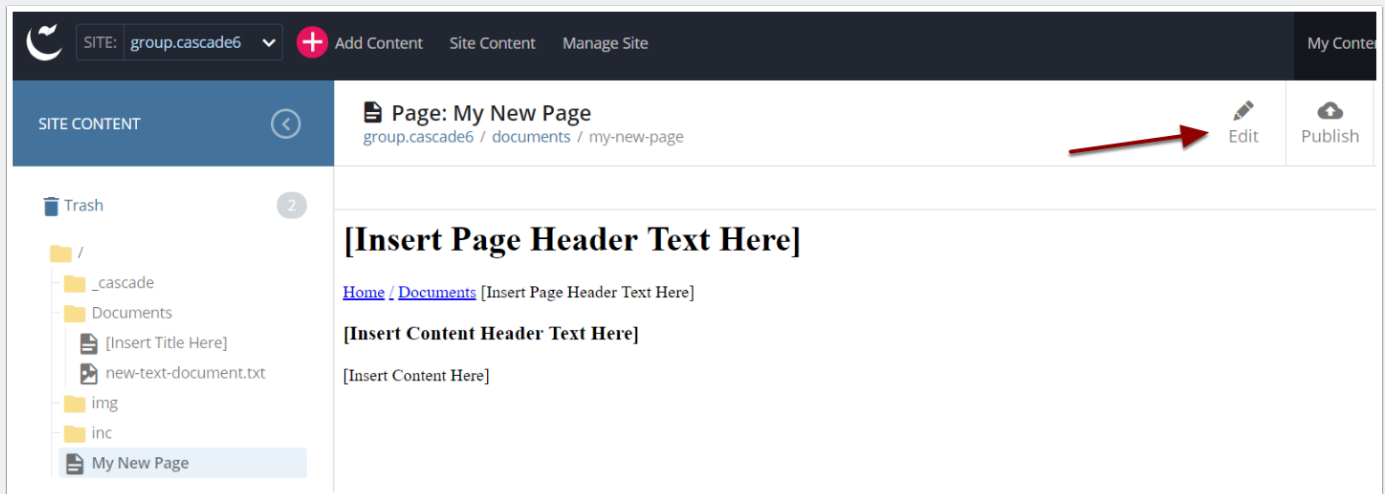
If uploaded correctly, you will see the green Asset created successfully bar as well as your document in the documents folder. **NOTE:** This file will only be visible if it is attached to a content page that is published.



Uploading a Document

5. Attaching the Document to a Page

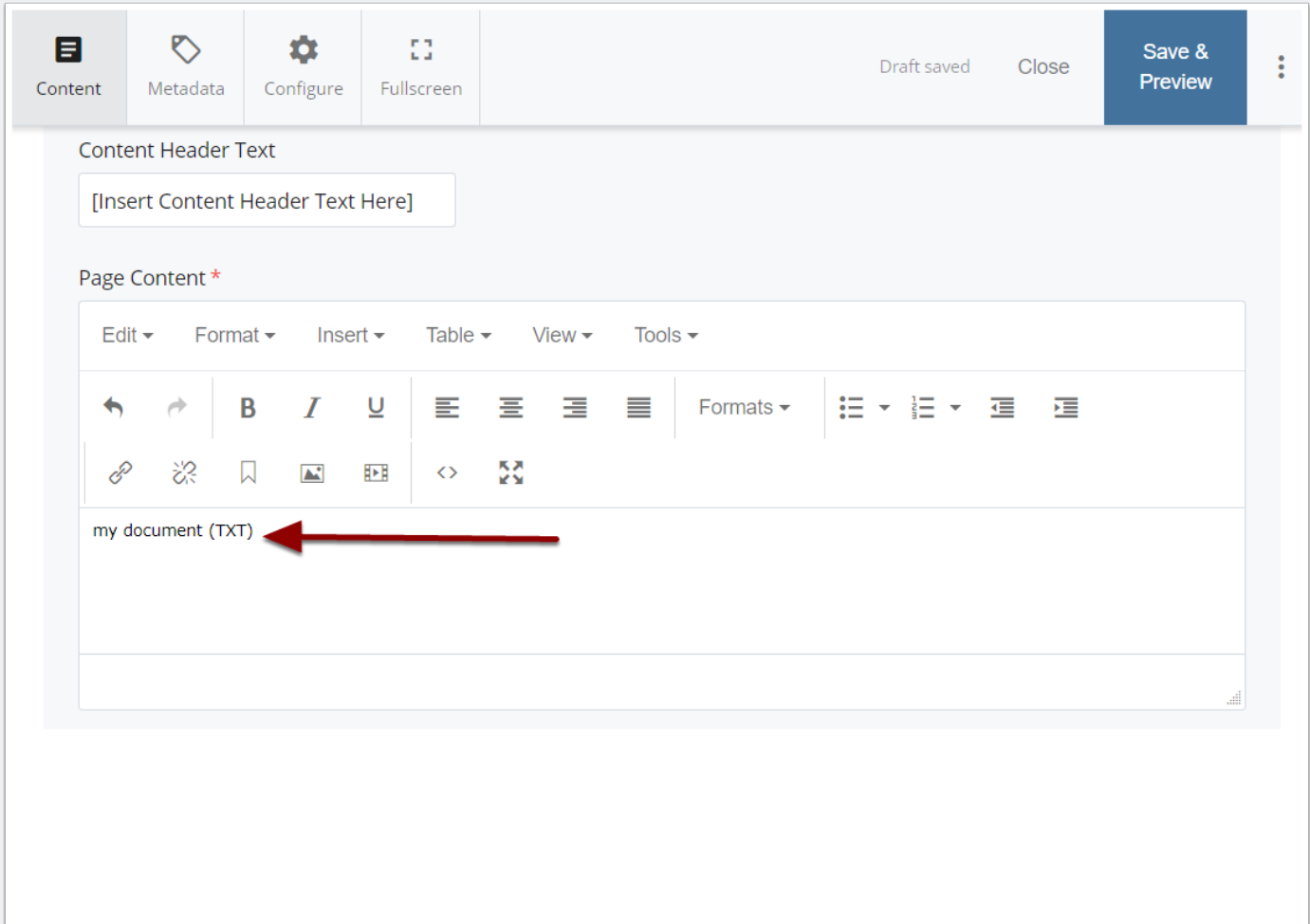
Select a page from your site and then click on Edit.



Uploading a Document

5.1 Page Content

In the Page Content area, type some descriptive text for the document. Be sure to put the document type in parathesis like (PDF) for a pdf or (DOCX) for a Word document.

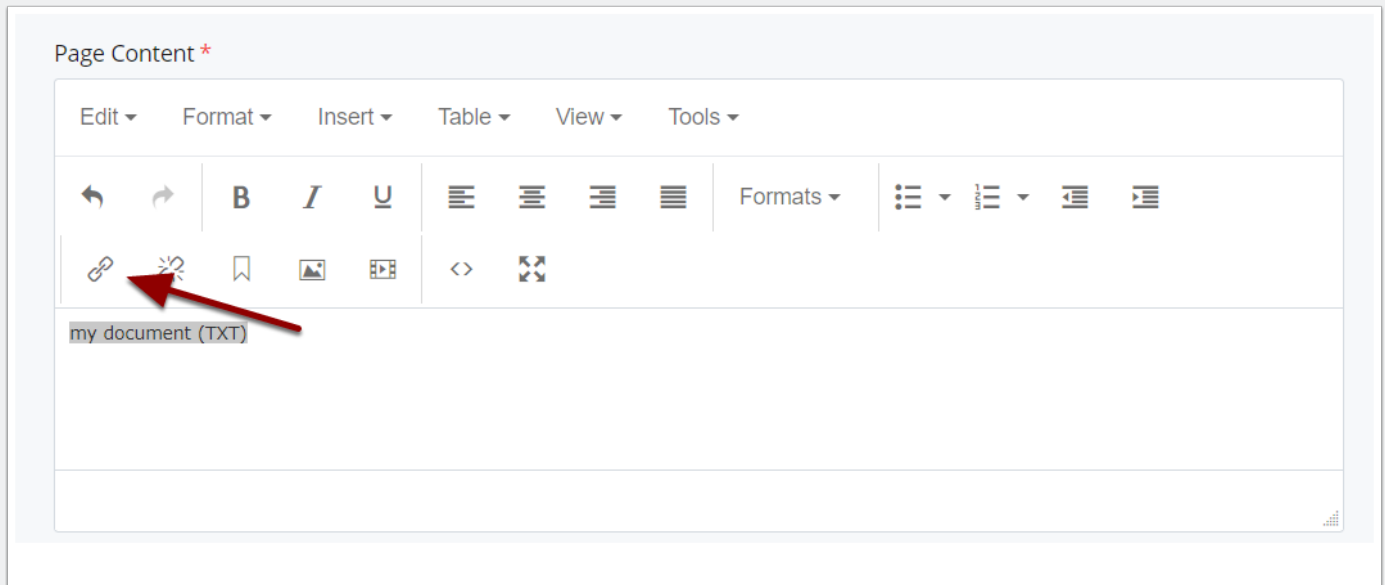


The screenshot displays a document editor interface. At the top, there is a navigation bar with tabs for 'Content', 'Metadata', 'Configure', and 'Fullscreen'. On the right side of the navigation bar, it shows 'Draft saved', 'Close', and a 'Save & Preview' button. Below the navigation bar, the 'Content Header Text' section contains a text input field with the placeholder '[Insert Content Header Text Here]'. The main 'Page Content' area features a rich text editor with a menu bar including 'Edit', 'Format', 'Insert', 'Table', 'View', and 'Tools'. The editor toolbar contains icons for undo, redo, bold, italic, underline, bulleted list, numbered list, link, unlink, bookmark, insert image, insert video, source code, and full screen. The text 'my document (TXT)' is entered in the editor, and a red arrow points to it from the right.

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5.2 Create the Link

Highlight the text you want to link to the document and click on the chain icon.



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5.3 Select the Document

Make sure that Internal is selected [1] and then click on the Choose File, Page, or Link button [2] to look for your document.

Insert/edit link ✕

Link Source 1 Internal External

Link 2 [Choose File, Page, or Link](#)

Anchor

Text to display

Title

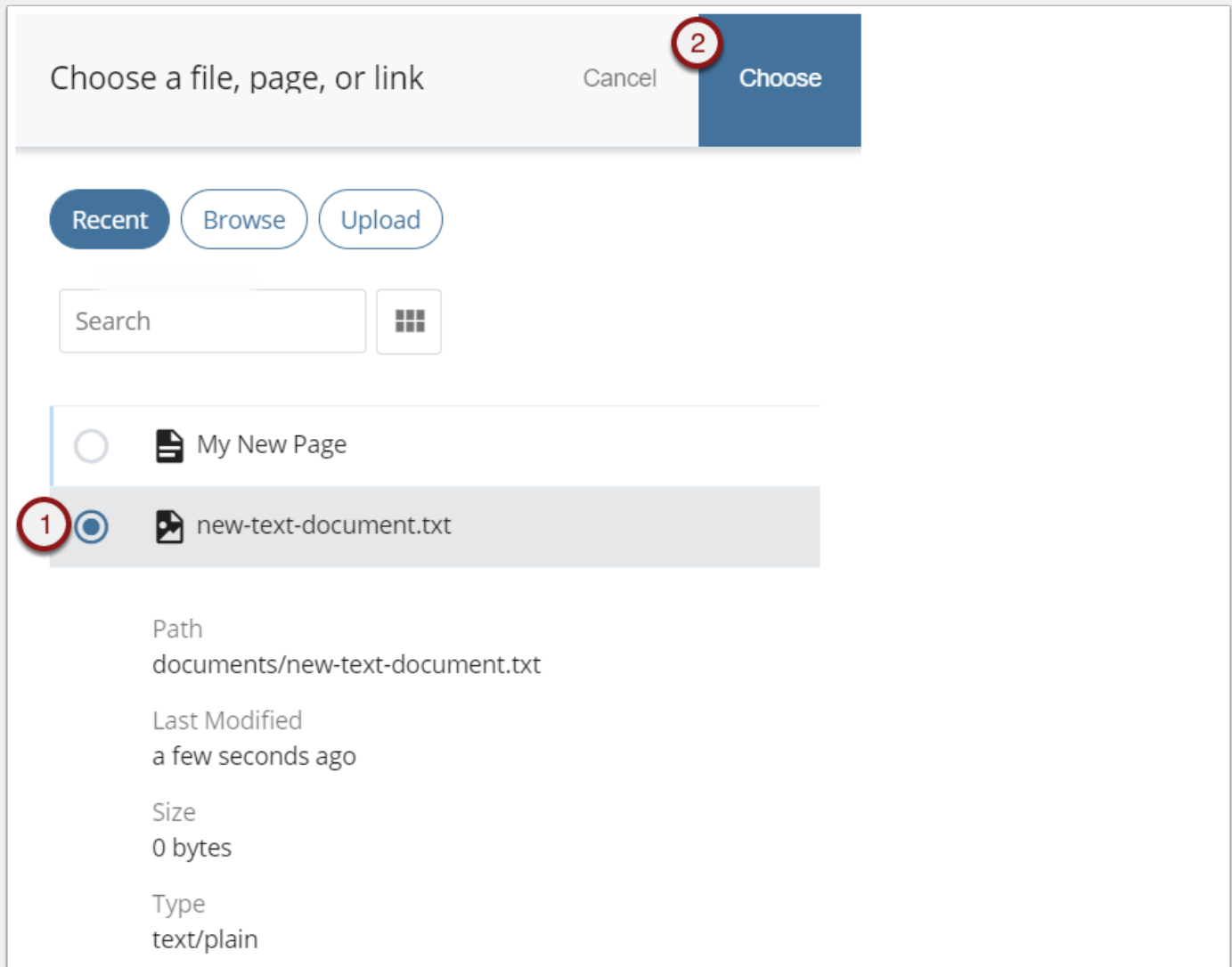
Target ▼

Class ▼

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5.4 Browse for your Document

Browse or search for your document. Select it, then click the Choose button.



Uploading a Document

5.5 Give the Link a Title

Give the link a descriptive Title (for accessibility) and click on Ok.

Insert/edit link ✕

Link Source Internal External

Link ✕
group.cascade6: /documents/new-text-docum...

Anchor

Text to display

Title **1**

Target ▼

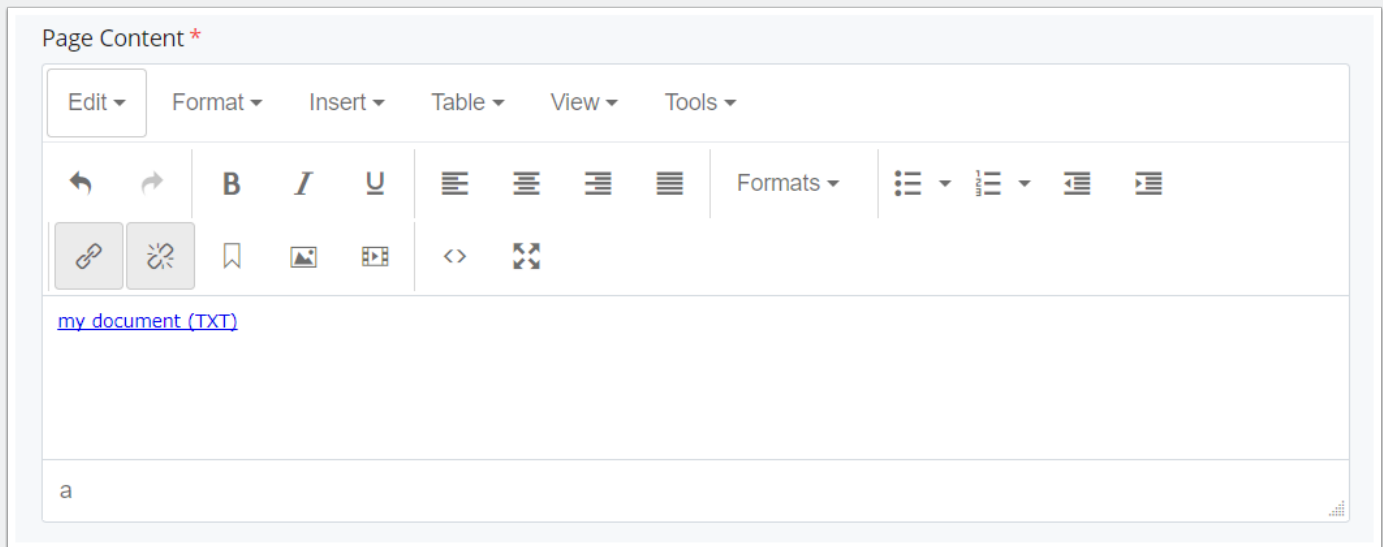
Class ▼

2

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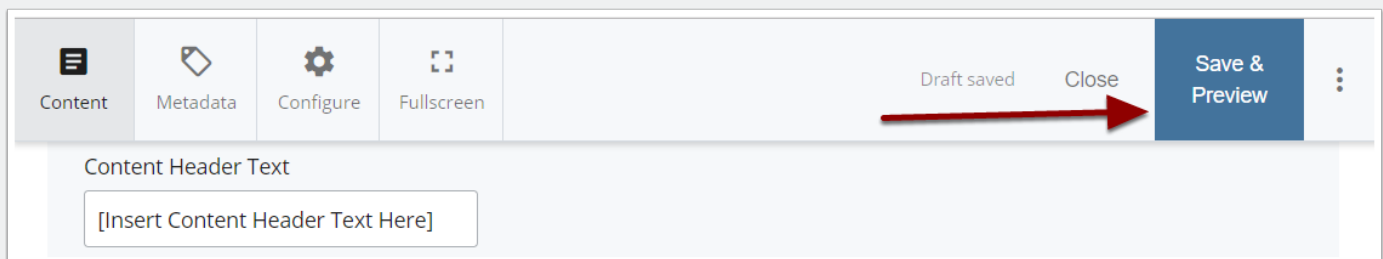
5.6 Link is Active

The text color will now change to blue and it will be underlined to show that the link is now active.



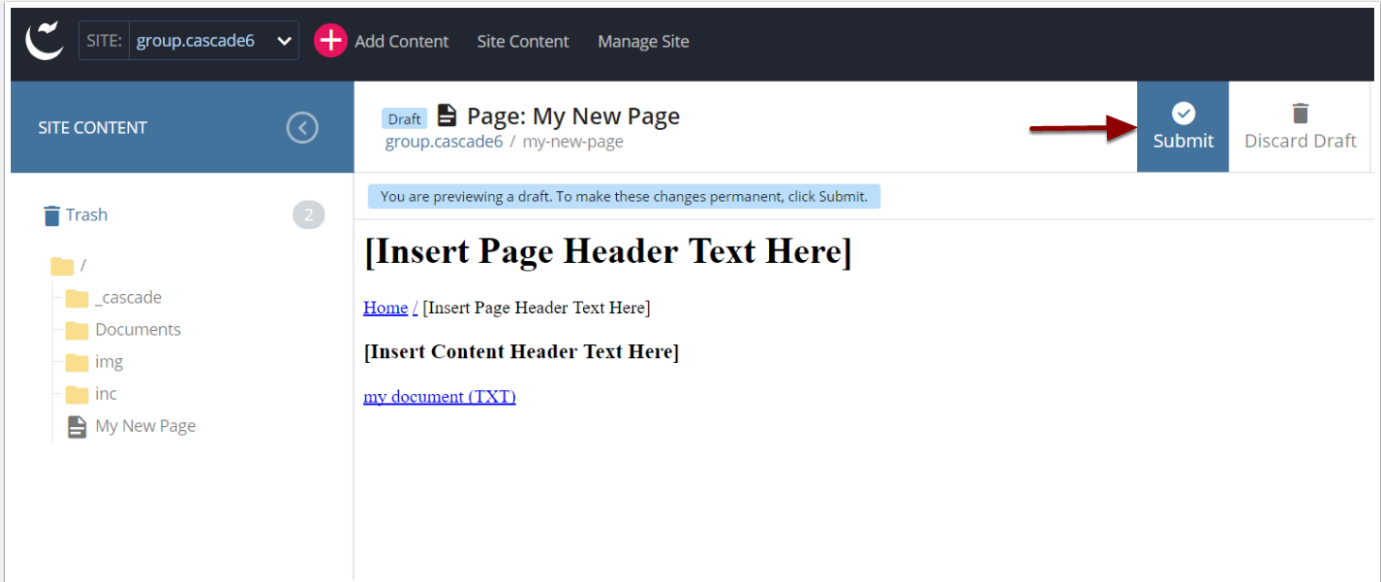
6. Save and Preview

When you are done with the page click the Save & Preview button at the top.



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6.1 Save changes



The screenshot displays a web content management system interface. At the top, a dark navigation bar contains a logo, a site selector for 'group.cascade6', and links for 'Add Content', 'Site Content', and 'Manage Site'. Below this, a blue sidebar on the left is labeled 'SITE CONTENT' and shows a file tree with folders like '_cascade', 'Documents', 'img', and 'inc', and a file named 'My New Page'. The main content area shows a draft page titled 'Page: My New Page' with the URL 'group.cascade6 / my-new-page'. A red arrow points to the 'Submit' button, which is a blue button with a white checkmark icon. To its right is a 'Discard Draft' button with a trash icon. A light blue notification bar above the content area reads: 'You are previewing a draft. To make these changes permanent, click Submit.' The content area itself contains placeholder text: '[Insert Page Header Text Here]', a link 'Home / [Insert Page Header Text Here]', '[Insert Content Header Text Here]', and another link 'my.document (TXT)'.

Uploading a Document

6.2 Publish to Test

Choose the workflow Publish to Test [1] and click Check Content & Submit [2]. If the document has errors, you can fix them in the content check.

Comment on the changes you made.

Updated Page Content from '[Insert Content Here]' to 'my document (TXT)'.
/

Workflow

Use a Workflow

Publish To Test 1

Submit now or perform guided content checks.

Start Workflow 2 Check Content & Submit

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6.3 Start Workflow

Click on Start Workflow. You can use the comments section to track any comments you would like others in the website group to see.

Start Workflow: Publish To Test
Back to page

Skip Workflow Back Start Workflow

Workflow Name *

Publish To Test: My New Page

Comments for reviewer

Comment with workflow related information here. For example, what needs to be reviewed.

Version Comments

Updated Page Content from "[Insert Content Here]" to "my document (TXT)".

Comments left here will be saved in the asset's version history once the workflow completes.

Due Date *

07-26-2017 12:00 AM

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6.4 Asset Created Successfully

You should see the green Asset created successfully box if your workflow has been completed.

