How to Use the ChesapeakeBay.net Content Management System (CMS)

Content management systems are tools that help users create, manage, and modify web content. Because Chesapeake Bay Program Staffers are responsible for updating group pages and calendar events, staffers must be trained in our CMS. Staffers will not be granted access to the CMS until they have completed this training.

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Quick Tips

- Fields that are marked with a **red asterisk** are required.
- The **size limit** for all files uploaded to the CMS is 16MB. Because **file names** inform file URLs, file names should be clear and easily identifiable. Before you upload a file to the CMS, consider matching its name to its title. For example, Backgrounder-Shad-in-the-Chesapeake-Bay.pdf would be a more descriptive file name than cbp_12244.pdf.
- When adding new events to the Meetings Calendar, include the month and year in the **meeting title**. Use a hyphen to separate the month and year from the name of the meeting itself (e.g., Management Board Quarterly Progress Meeting - September 2022). Do not use a comma or parenthesis.
- When an event has been **canceled**, you may choose to (a) add CANCELED: to the meeting title (e.g., CANCELED: Status and Trends Workgroup Meeting - September 2022) or (b) remove it from the CMS.

Useful Contacts

Please visit the Web Development & Support page to request CMS training or report a bug with ChesapeakeBay.net. You may also contact the individuals below to assist you with your request.

Need	Contact
Help using the CMS.	Dan Brellis (Lead Developer)
A link, image, file, or other asset is broken, out-of-date, or otherwise needs to be updated.	Jake Solyst (Web Content Specialist)
A technical feature or function is not working as intended.	Dan Brellis (Lead Developer)
New feature or product request.	Catherine Krikstan (Web Product Manager)

1. Log Into the CMS

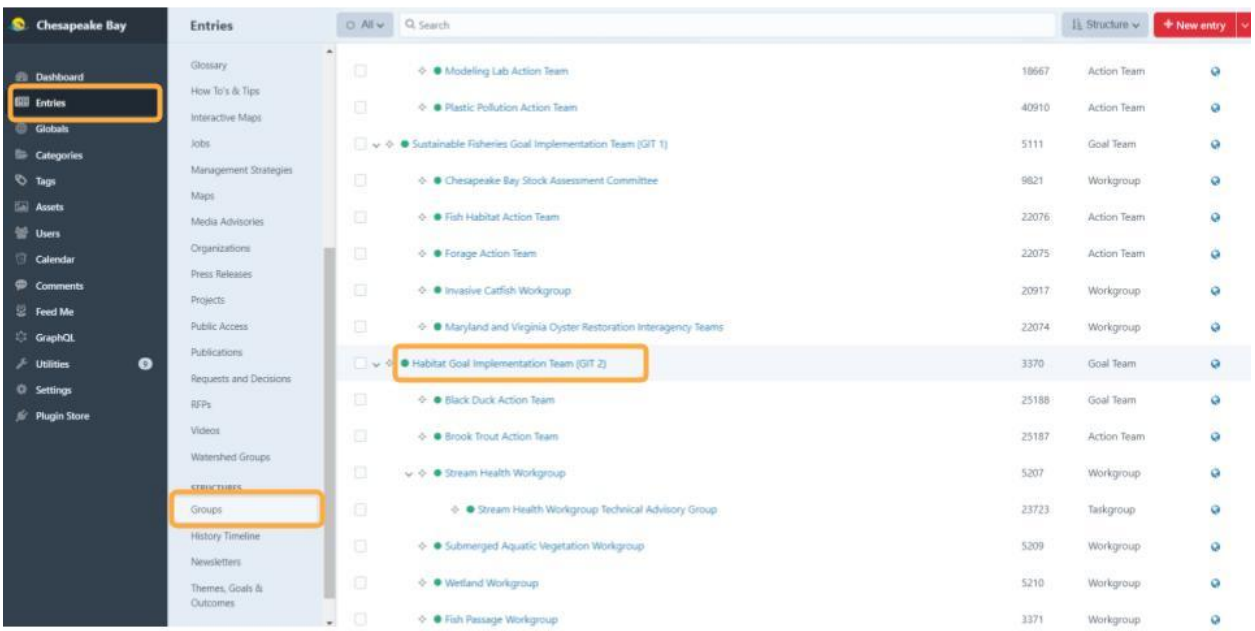
Visit https://www.chesapeakebay.net/cms/. Enter your **username** and **password** and click **Login**.

To reset your password, click **Forgot your password?**, enter your **username**, click **Reset Password,** and follow the instructions sent via email.

2. Edit a Group Page

From the Dashboard, select **Entries**. From the list of Entries, select **Groups.** From the list of Groups, select **the name of the Group** whose page you wish to edit (Screenshot 2.1). Note: You can use the search bar to refine the list of Group pages displayed in the CMS.

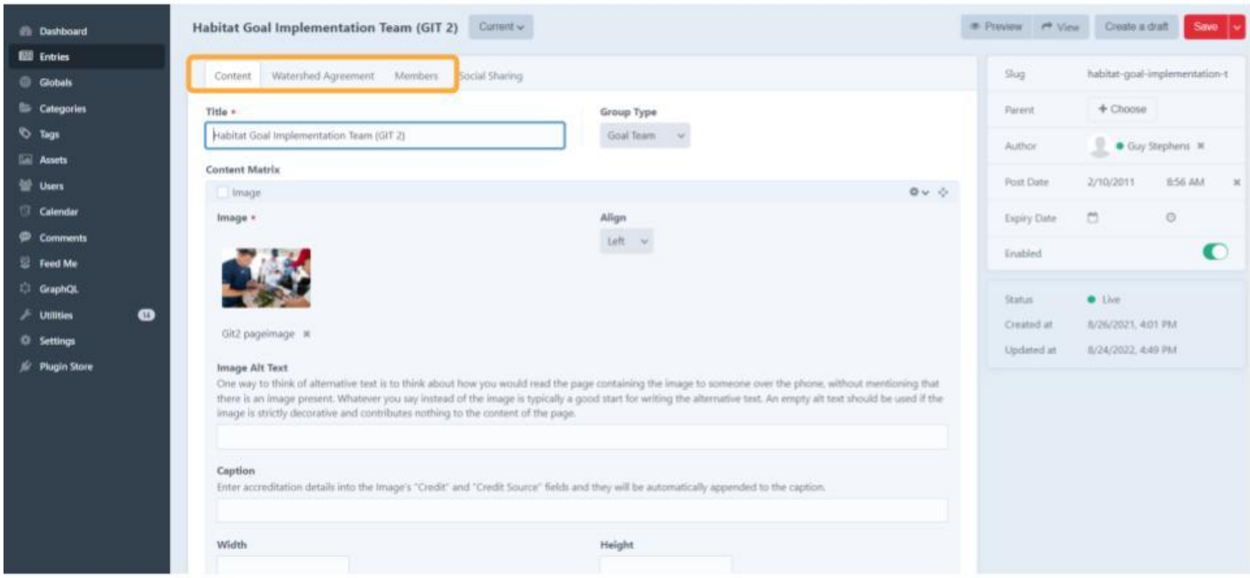
Screenshot 2.1



Screenshot 2.1 shows the options a user would select to edit the Habitat GIT page.

While most of the information that can be found on a Group page is located under the **Content tab**, staffers are also responsible for keeping the **Watershed Agreement tab** and **Members tab** up-to-date (Screenshot 2.2).

Screenshot 2.2



Screenshot 2.2 shows the three tabs that contain information staffers must keep up-to-date: Content, Watershed Agreement, and Members.

The **Content tab** includes the following fields:

- **Title:** The group name. (This field is mandatory.)
- **Group Type:** The group type (e.g., Goal Implementation Team, Committee, Workgroup, Action Team, etc.). (This field is mandatory.)
- **Image:** An image that depicts the group or represents its work.
- **Text:** A short description of the group.
- **Upcoming Meetings:** Meetings and other events associated with the group.
  - Note: This list is populated automatically. See Section 6 for instructions on adding, editing, or removing calendar events.
- **Scope and Purpose:** A description of the group and its work.
- **Projects and Resources** and **Publications:** Projects or resources the group wishes to highlight and publications the group authored or otherwise contributed to.
  - Note: Projects or publications can be removed by clicking the small **x** located to the right of their name. Projects or publications can be added by clicking the **+ Add a project** or **+ Add a publication** buttons and selecting the appropriate publication from the pop-up list. See Section 4 for instructions on adding publications to the CMS. See Section 5 for instructions on adding projects to the CMS.
- **Related Links:** External websites associated with or relevant to the group.

    - Note: The **Link URL** field should contain the full URL of the external website. The **Link Title** field should contain the display text (i.e., the text that will be linked).

If applicable, the **Watershed Agreement tab** includes a list of Outcomes relevant to the Group.

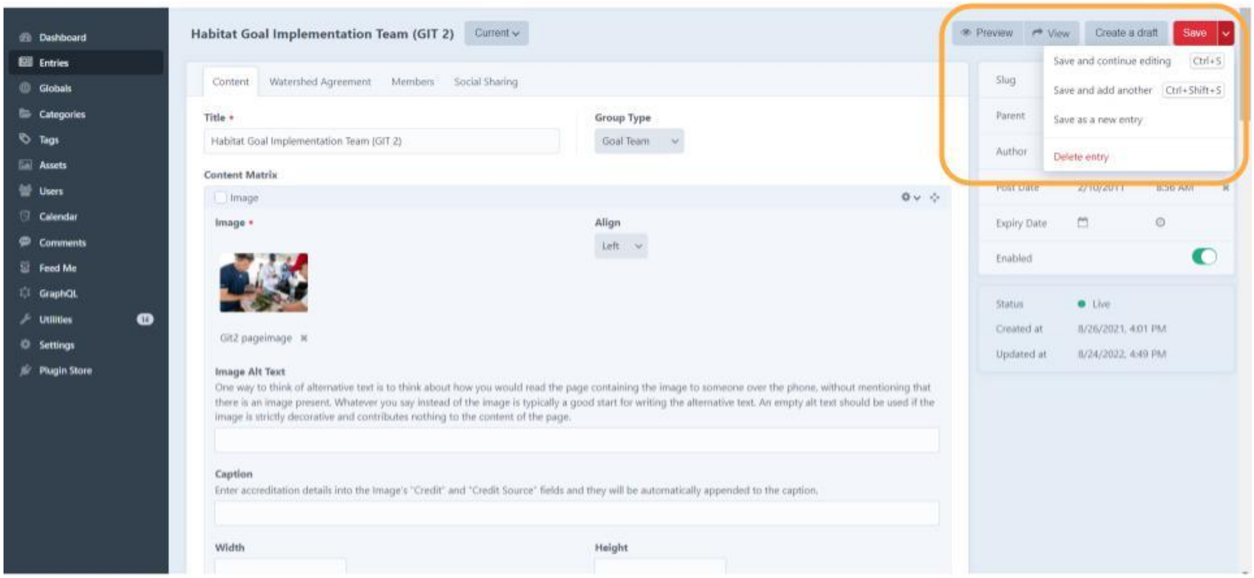
The **Member tab** includes lists of group members, arranged into the following categories: Chair, Vice Chair, Coordinator, Staff, and Members. Members can be removed from any one of these lists by clicking the small **x** located to the right of their name. Members can be added by clicking the **+ Add an entry** button at the bottom of the appropriate list and selecting the appropriate contact from the pop-up list. See Section 3 for instructions on adding new contacts to the CMS.

Note: Sub-groups (i.e., Workgroups or Action Teams that are located within a larger Goal Implementation Team) are identified within the structure of the CMS itself. To add, remove, or modify a Goal Implementation Team's sub-groups, contact Jake Solyst (Web Content Specialist).

Once you have edited a Group page, you can take one of the following actions (Screenshot 2.3):

- **Preview** the changes in a pop-up window alongside the CMS.
- **View** the changes in a new tab.
- **Save** the changes, which publishes them online.
    - Note: The Save button features a drop-down menu that allows for a fourth action: **Save and continue editing**, i.e., publish the changes you've made thus far, but remain on the same page to make more.

Screenshot 2.3



Screenshot 2.3 shows the options a user could select to preview or publish their Group page content revisions.

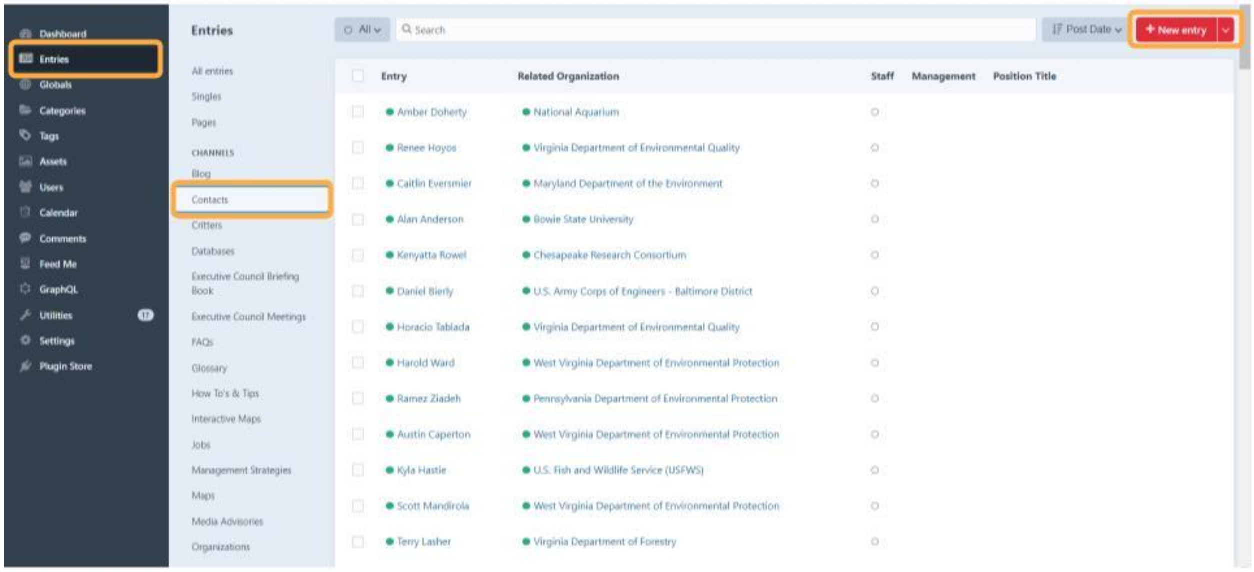
3. Add or Edit a Contact

Add a Contact

From the Dashboard, select **Entries**. From the list of Entries, select **Contacts.** Click the **+ New entry** button (Screenshot 3.1.) Alternatively, from the Dashboard, select **Entries**. From the **Entries** page, click the **+ New entry** drop-down menu and select **Contacts** from the drop-down list (Screenshot 3.2).

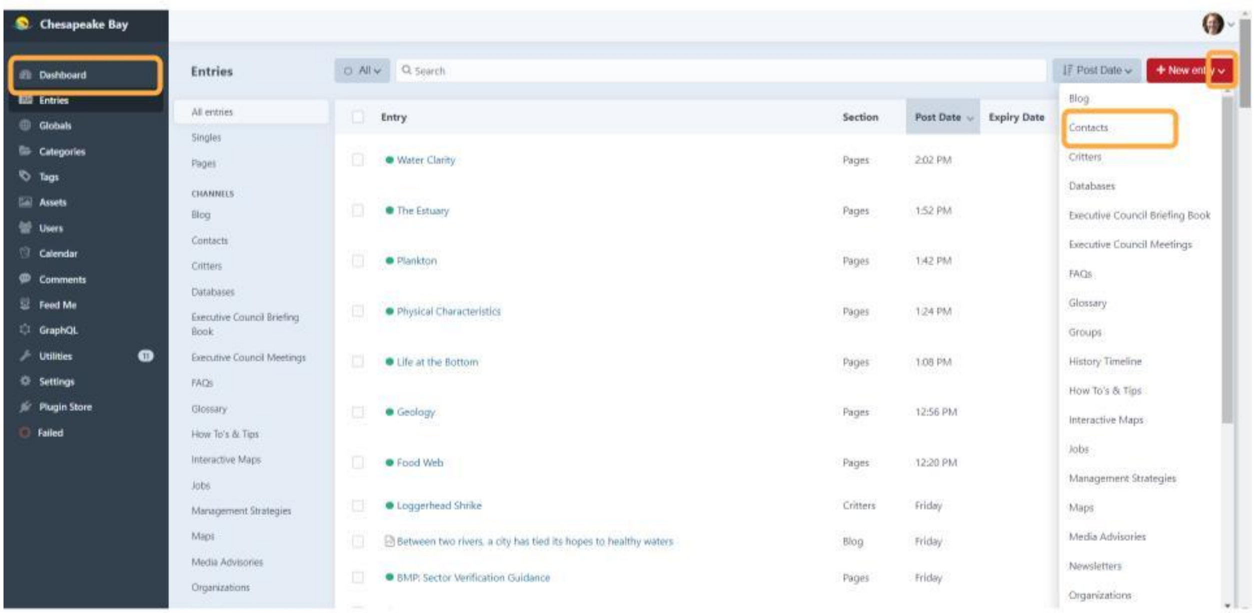
- Note: All contacts must include a **First Name, Last Name,** and **Email Address**. If a contact is a Chesapeake Bay Program staff member, the **Staff indicator** located under the **CBPO Staff tab** should be turned on (Screenshot 3.3).

Screenshot 3.1



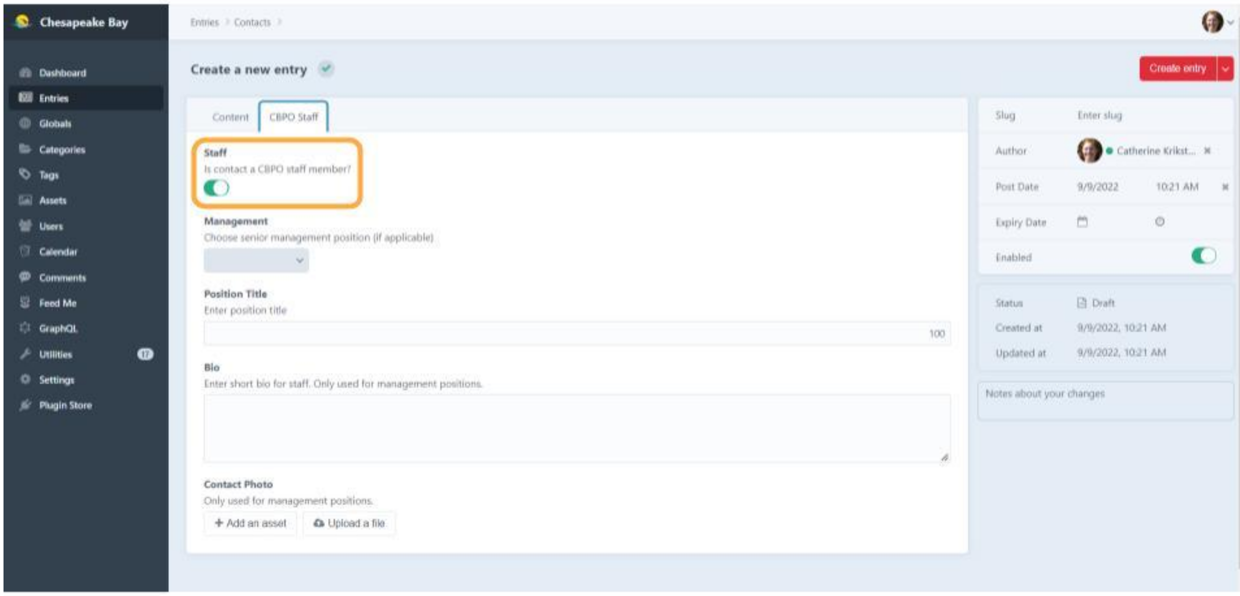
Screenshot 3.1 shows one path for adding a new Contact to the CMS.

Screenshot 3.2



Screenshot 3.2 shows a second path for adding a new Contact to the CMS.

Screenshot 3.3

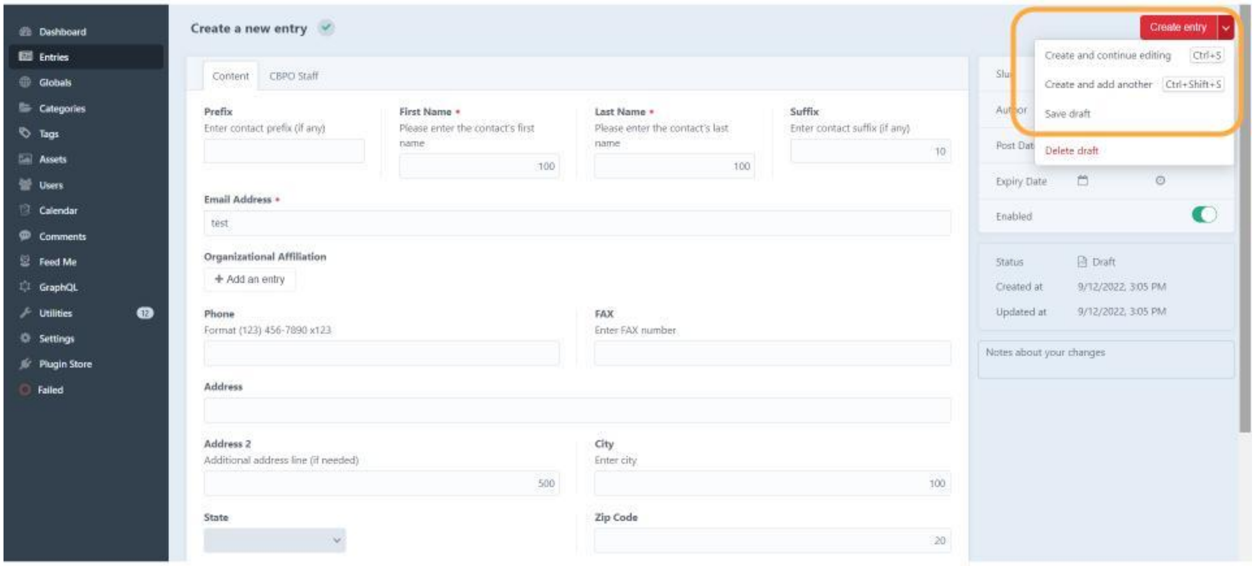


Screenshot 3.3 shows the indicator that should be turned on if a contact is a Chesapeake Bay Program staff member.

Once you have completed the required fields, you can publish a Contact by clicking the **Create entry** button (Screenshot 3.4).

- Note: The Create entry button features a drop-down menu that allows for additional actions, including: **Save and continue editing,** i.e., publish the changes you've made thus far, but remain in the CMS to make more, and **Save draft**, i.e., save the changes you've made thus far, but do not publish them to the website.

Screenshot 3.4



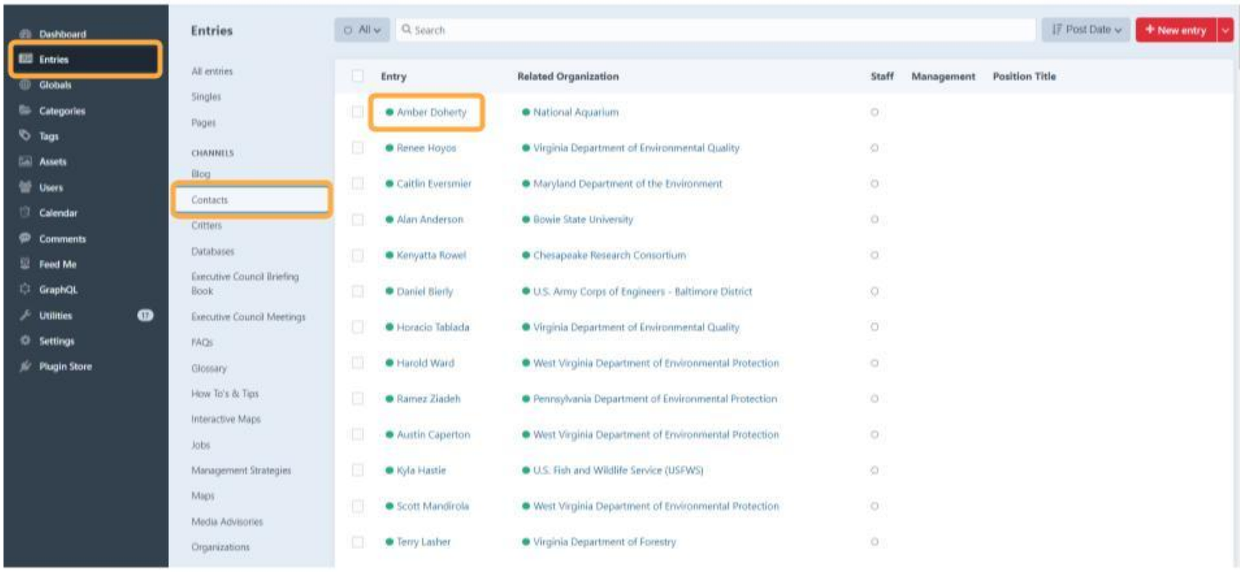
Screenshot 3.4 shows the options a user could select to save or publish their Contact entry.

Edit an Existing Contact

From the Dashboard, select **Entries.** From the list of Entries, select **Contacts.** From the list of Contacts, select **the name of the Contact** whose information you wish to edit (Screenshot 3.5).

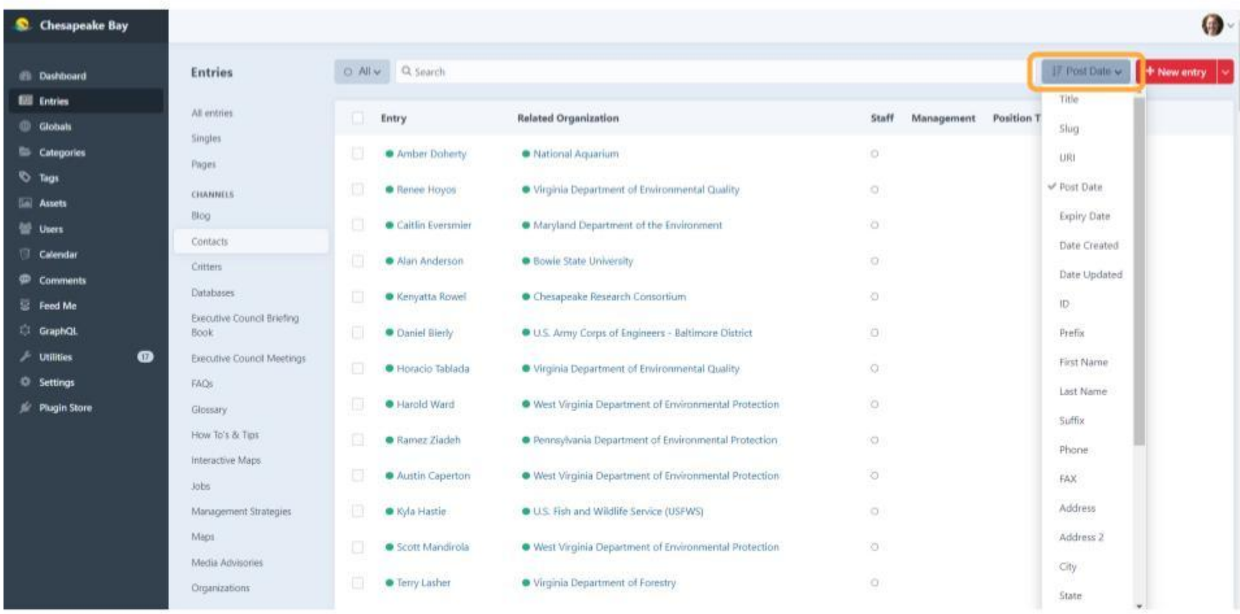
- Note: The CMS automatically sorts existing contacts by the date on which their entries were published. To sort existing contacts by another characteristic (e.g., First Name or Last Name), click the **[Sort By] Post Date** button (Screenshot 3.6).

Screenshot 3.5



Screenshot 3.5 shows the options a user would select to edit an existing Contact.

Screenshot 3.6



Screenshot 3.6 shows the options a user could select to re-order the list of Contacts within the CMS.

To publish your revisions, click the **Save** button.

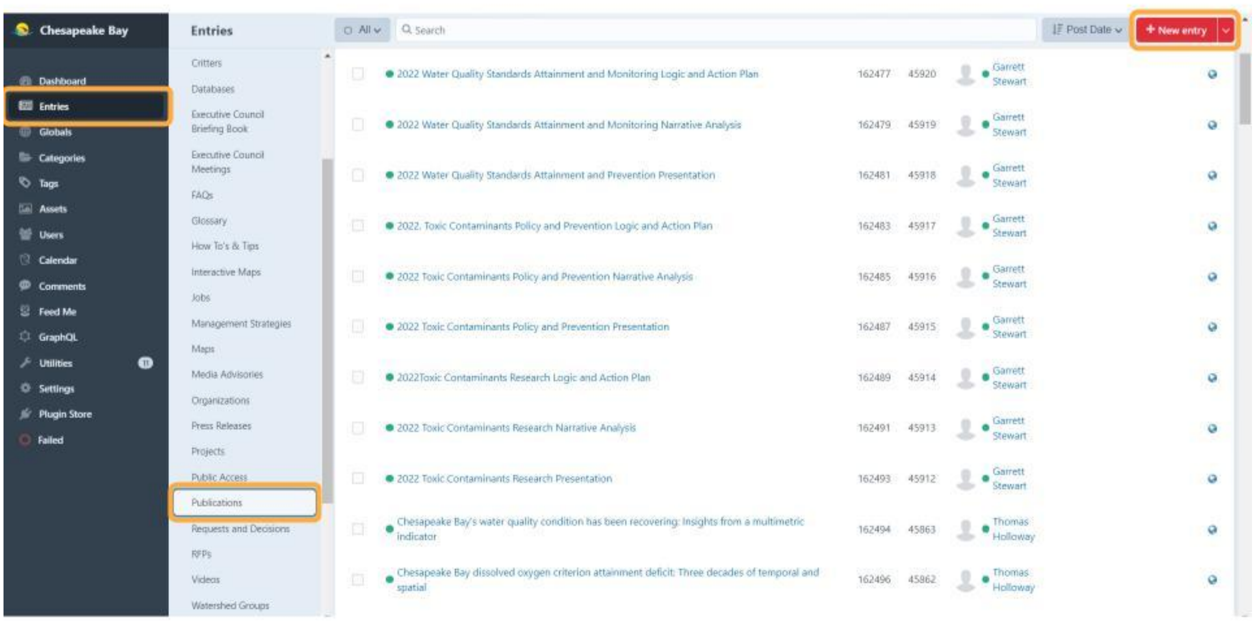
- Note: The Save button features a drop-down menu that allows for additional actions, including **Save and continue editing,** i.e., publish the changes you've made thus far, but remain in the CMS to make more.

4. Add or Edit a Publication

Add a Publication

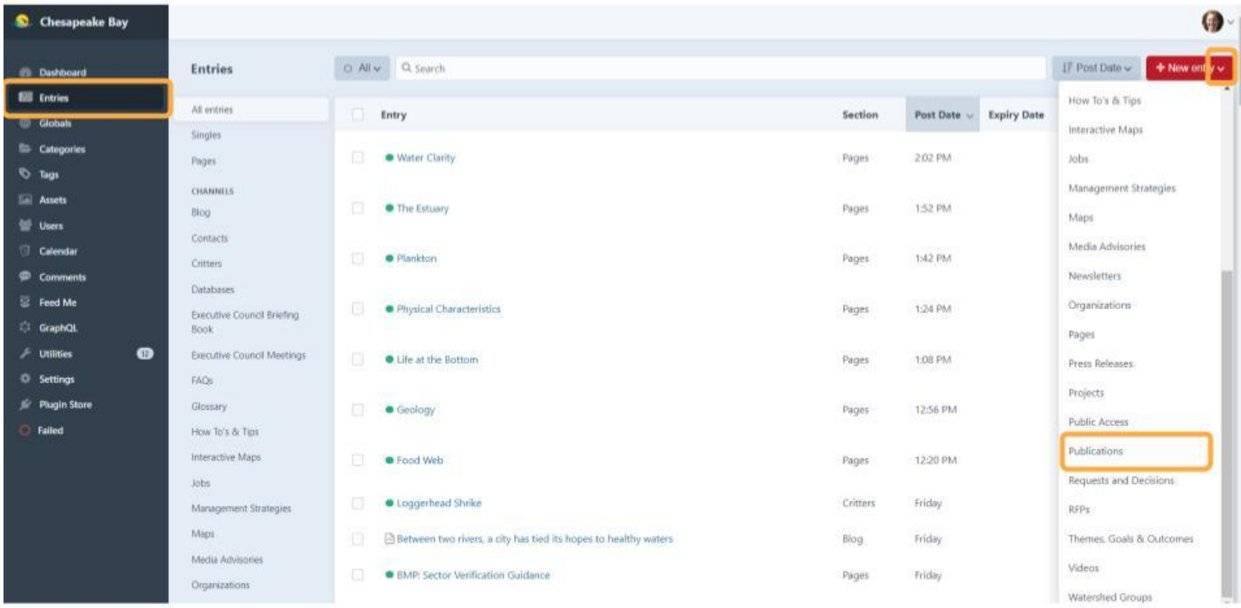
From the Dashboard, select **Entries**. From the list of Entries, select **Publications.** Click the **+ New entry** button (Screenshot 4.1). Alternatively, from the Dashboard, select **Entries**. From the **Entries** page, click the **+ New entry** drop-down menu and select **Publications** from the drop-down list (Screenshot 4.2).

Screenshot 4.1



Screenshot 4.1 shows one path for adding a new Publication to the CMS.

Screenshot 4.2

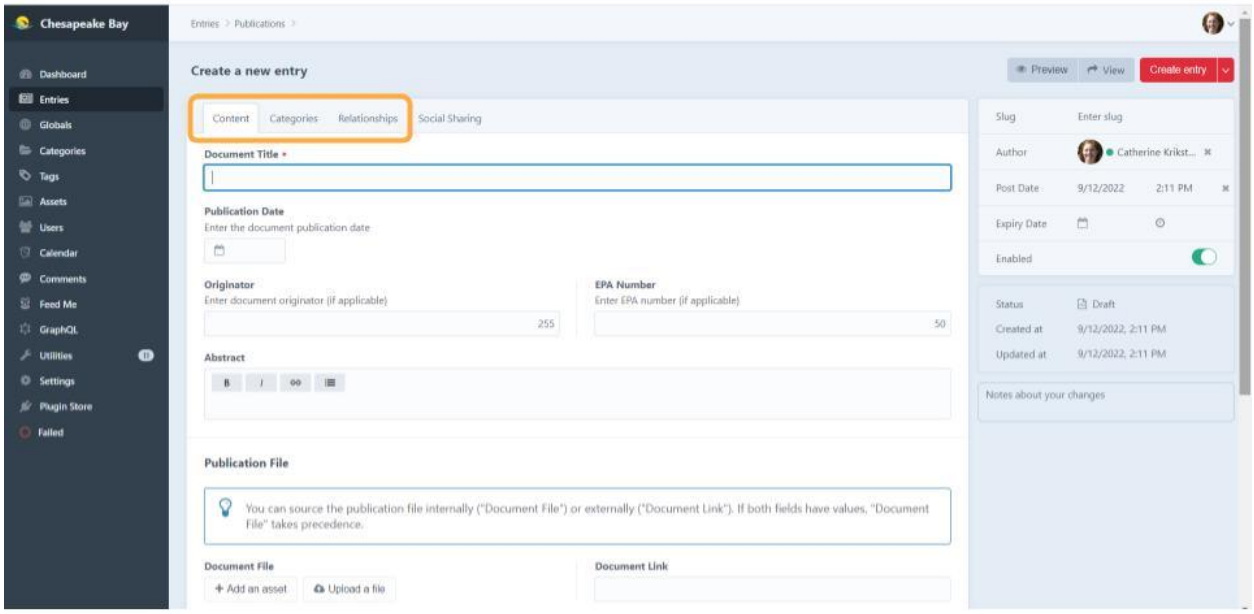


Screenshot 4.2 shows a second path for adding a new Publication to the CMS.

While most of the information that can be found on a Publication page is located under the **Content tab**, staffers should also use the **Categories tab** to categorize all publications and use the **Relationships tab** to confirm whether a publication has been appropriately added to a Group's Publications list (Screenshot 4.3).

- Note: While the **Relationships tab** indicates whether a publication has been appropriately added to a Group's Publications list, publications cannot be added to a Group's Publications list from this part of the CMS. To link a publication to a Group page, you must edit the Group page itself. See Section 2 for instructions on editing a Group page.

Screenshot 4.3



Screenshot 4.3 shows the three tabs that contain information staffers must keep up-to-date: Content, Categories, and Relationships.

The **Content tab** includes the following fields:

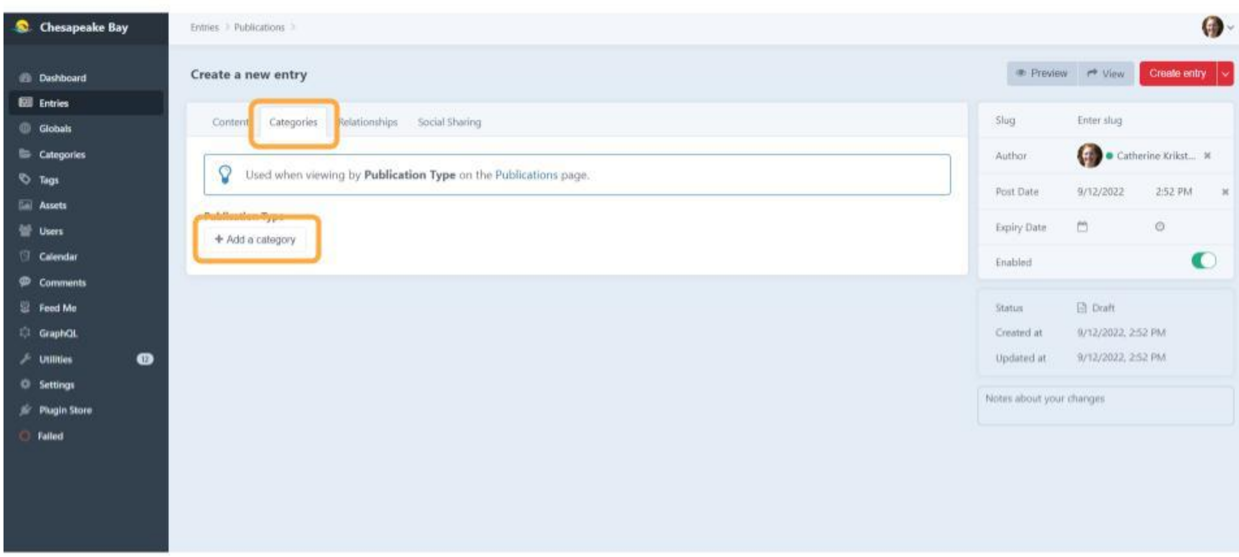
- **Document Title:** The publication name. (This field is mandatory.)
- **Publication Date:** The publication's date of origin.
- **Originator:** The organization, agency, or group from which the publication originated.
- **EPA Number:** Applicable to certain publications that originated from the U.S. EPA.
- **Abstract:** A short description of the publication.
- **Document File** or **Document Link:** The publication itself. This can be internal (i.e., a file uploaded to the CMS) or external (i.e., a link to a file hosted elsewhere on the internet). To link to a file that has already been uploaded to the CMS, click the **+ Add an asset** button. To insert a new file, click the **Upload a file** button. The **size limit** for all files uploaded to the CMS is 16MB. Because **file names** inform file URLs, file names should be clear and easily identifiable. Before you upload a file to the CMS, consider matching its name to its title. For example, [Backgrounder-Shad-in-the-Chesapeake-Bay.pdf] would be a more descriptive file name than cbp_12244.pdf.

Note: CBP Number and Bin Number are not displayed on Publication pages. Unless applicable, these fields do not need to be filled in.

The **Categories tab** indicates the Publication Type, which is useful when searching for documents in the [Publications Library](). To categorize a publication, click the **+ Add a category** button and select the appropriate category from the pop-up list (Screenshots 4.4 and 4.5). Categories include:

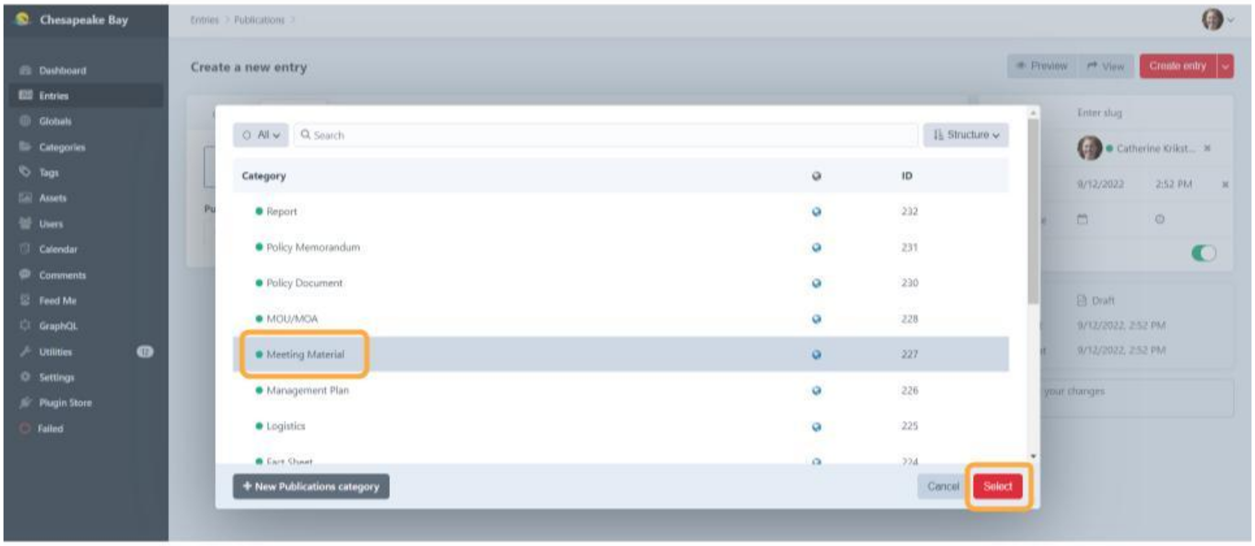
- Adoption Statement
- Agreement
- Backgrounder
- Brochure
- Directive
- Environmental Assessment
- Fact Sheet
- Logistics
- Management Plan
- Meeting Material
- MOU/MOA
- Outcome
- Policy Document
- Policy Memorandum
- Report

Screenshot 4.4



Screenshot 4.4 shows the options a user would select to categorize a new publication.

Screenshot 4.5

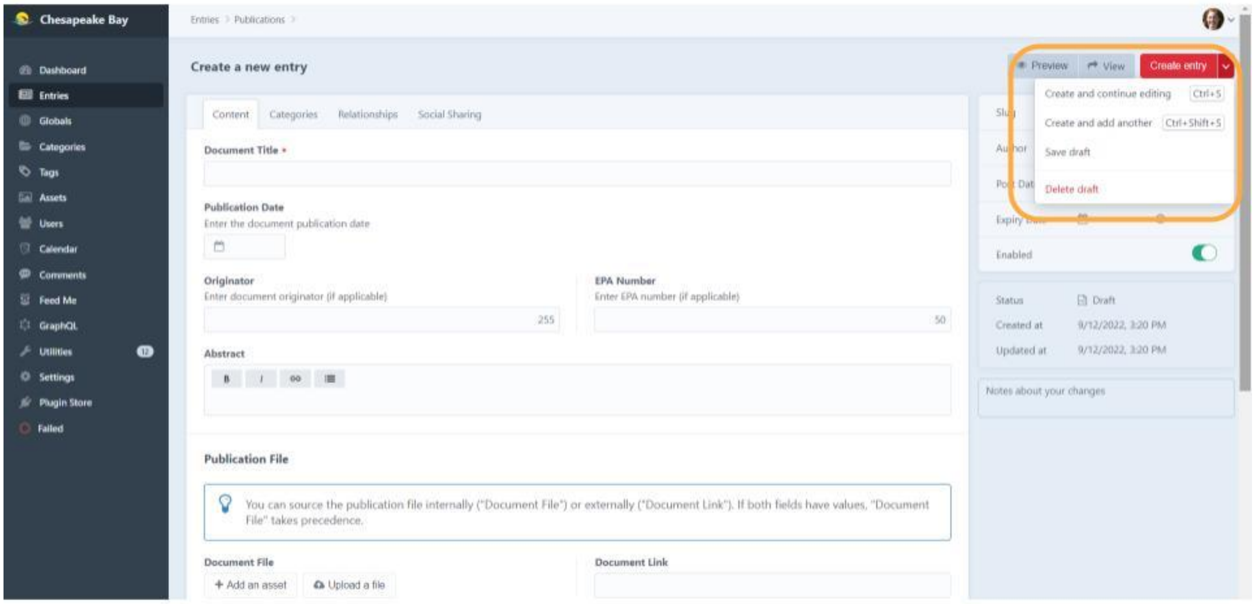


Screenshot 4.5 shows the options a user would select to categorize a new publication as a Meeting Material.

Once you have completed the required fields, you can publish a Publication by clicking the **Create entry** button (Screenshot 4.6).

- Note: The Create entry button features a drop-down menu that allows for additional actions, including: **Create and continue editing,** i.e., publish the changes you've made thus far, but remain in the CMS to make more, and **Save draft**, i.e., save the changes you've made thus far, but do not publish them to the website.

Screenshot 4.6



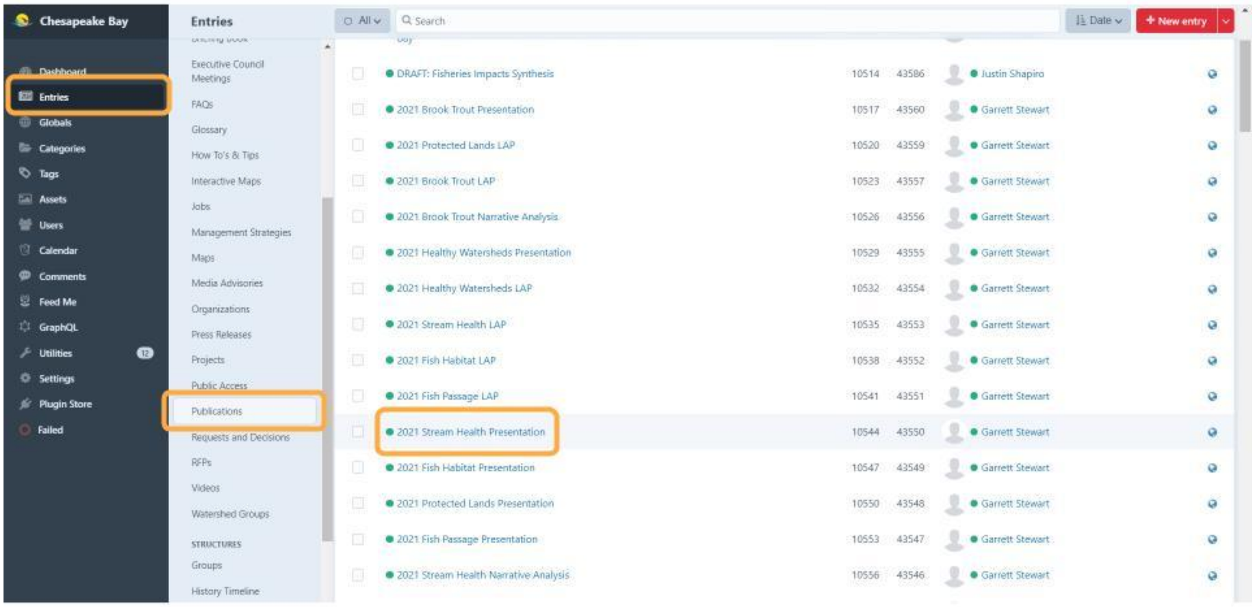
Screenshot 4.6 shows the options a user could select to save or publish their Publication.

Edit an Existing Publication

From the Dashboard, select **Entries.** From the list of Entries, select **Publications.** From the list of Publications, select the **name of the Publication** whose page you wish to edit (Screenshot 4.7). Note: You can use the search bar to refine the list of Publications displayed in the CMS.

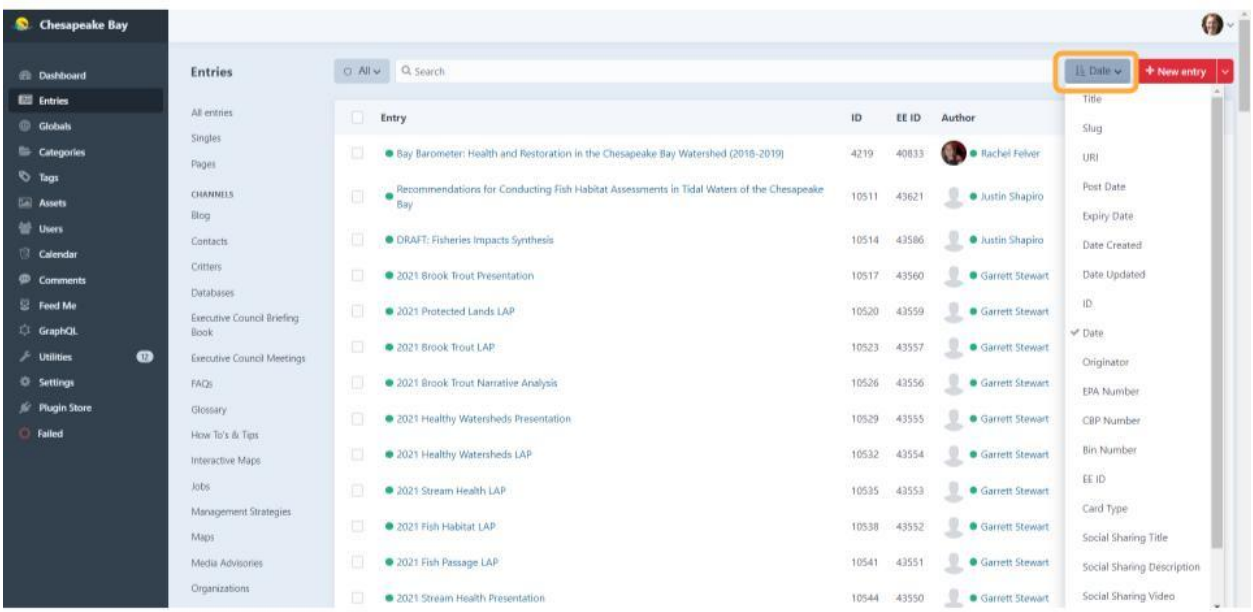
- Note: The CMS automatically sorts existing publications by the date on which their entries were published. (This is equivalent to the posting date, which is not necessarily the same as the publication date.) To sort existing publications by another characteristic (e.g., Title), click the **[Sort By] Date** button (Screenshot 4.8).

Screenshot 4.7



Screenshot 4.7 shows the options a user would select to edit the 2021 Stream Health Presentation.

Screenshot 4.8



Screenshot 4.8 shows the options a user could select to re-order the list of Publications within the CMS.

To publish your revisions, click the **Save** button.

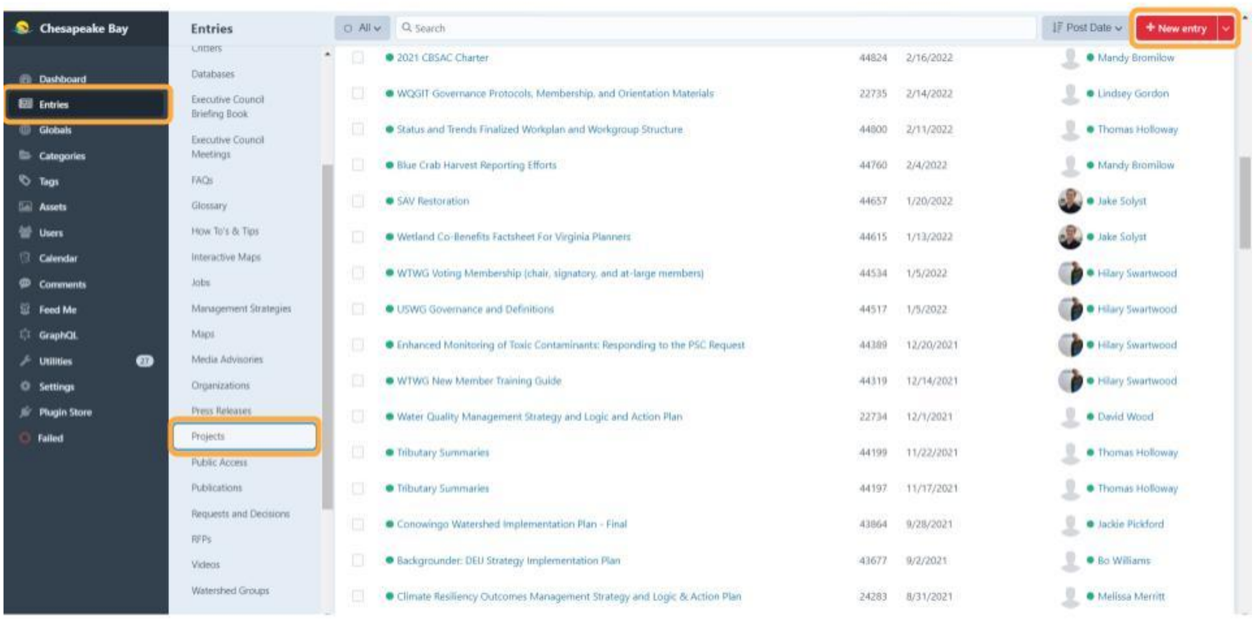
- Note: The Save button features a drop-down menu that allows for additional actions, including **Save and continue editing,** i.e., publish the changes you've made thus far, but remain in the CMS to make more.

5. Add or Edit a Project

Add a Project

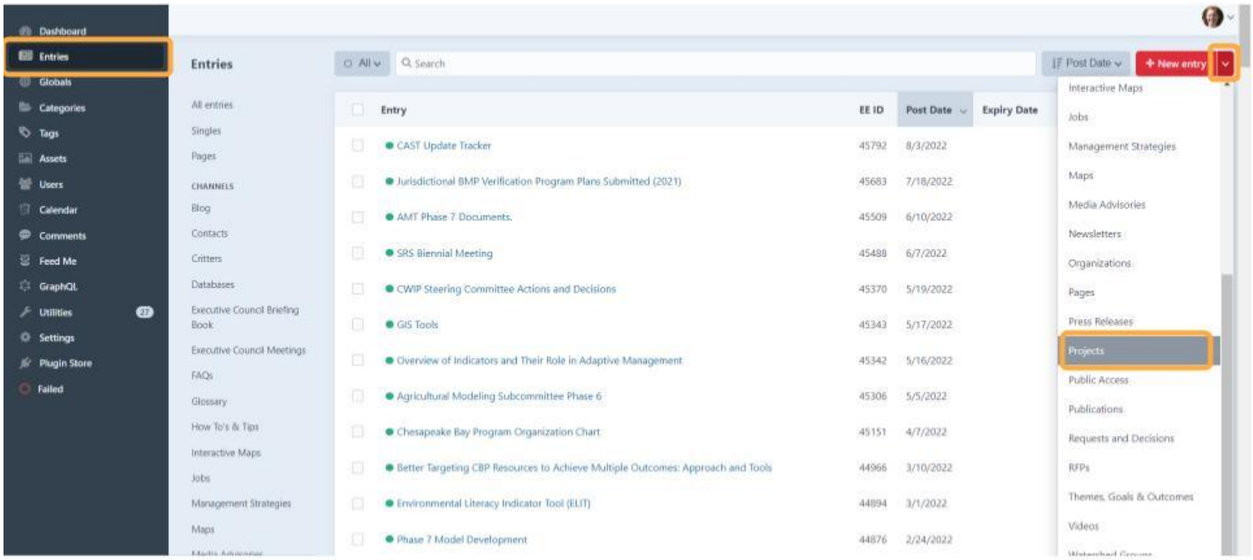
From the Dashboard, select **Entries**. From the list of Entries, select **Projects.** Click the **+ New entry** button (Screenshot 5.1). Alternatively, from the Dashboard, select **Entries**. From the **Entries** page, click the **+ New entry** drop-down menu and select **Projects** from the drop-down list (Screenshot 5.2).

Screenshot 5.1



Screenshot 5.1 shows one path for adding a new Project to the CMS.

Screenshot 5.2



Screenshot 5.2 shows a second path for adding a new Project to the CMS.

While most of the information that can be found on a Projects page is located under the **Content tab**, staffers should also use the **Relationships tab** to confirm whether a Project has been appropriately added to a Group's Projects and Resources list.

- Note: While the **Relationships tab** indicates whether a Project has been appropriately added to a Group's Projects and Resources list, Projects cannot be added to a Group's Projects and Resources list from this part of the CMS. To link a Project to a Group page, you must edit the Group page itself. See Section 2 for instructions on editing a Group page.

The **Content tab** includes the following fields:

- **Title:** The project name. (This field is mandatory.)
- **Description:** A description of the project.
  - Note: These descriptions often contain links. Links to internal content (i.e., content that is located on ChesapeakeBay.net) should be inserted differently than links to external content (i.e., content that is located on some other website). See Section 7 for instructions on inserting text links to internal content.
- **Project Files:** Files relevant to the project. To link to a file that has already been uploaded to the CMS, click the **+ Add an asset** button. To insert a new file, click the **Upload a file** button. The **size limit** for all files uploaded to the CMS is 16MB. Because **file names** inform file URLs, file names should be clear and easily identifiable. Before you upload a file to the CMS, consider matching its name to

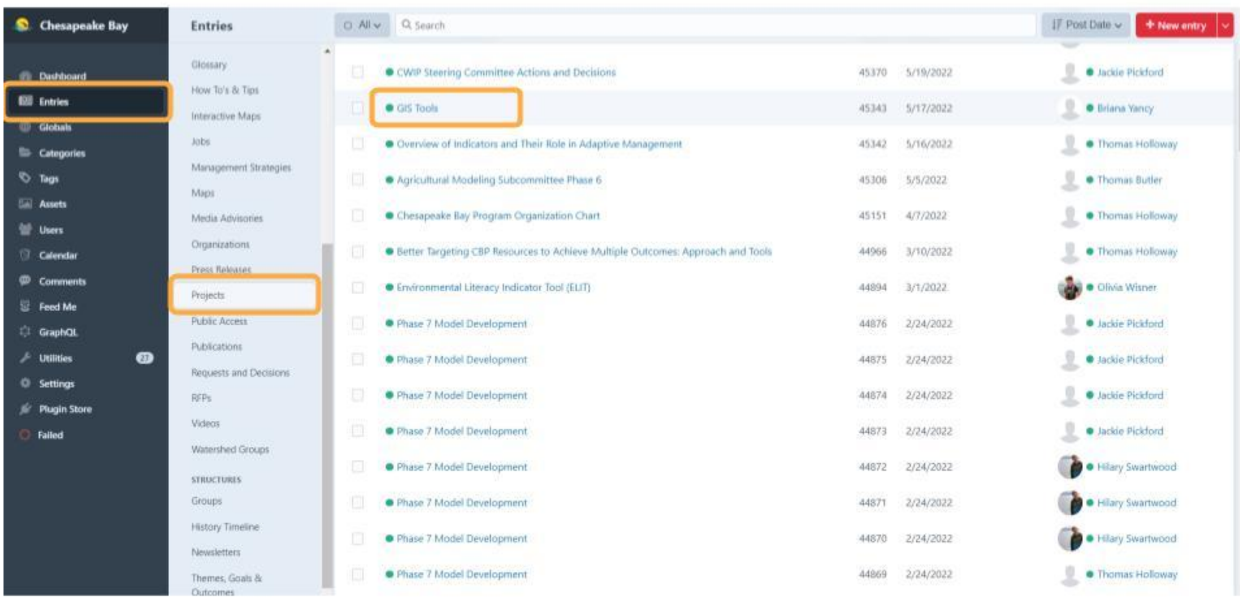
its title. For example, [Backgrounder-Shad-in-the-Chesapeake-Bay.pdf]() would be a more descriptive file name than cbp_12244.pdf.

Edit an Existing Project

From the Dashboard, select **Entries.** From the list of Entries, select **Projects.** From the list of Projects, select the **name of the Project** whose page you wish to edit (Screenshot 5.3). Note: You can use the search bar to refine the list of Projects displayed in the CMS.

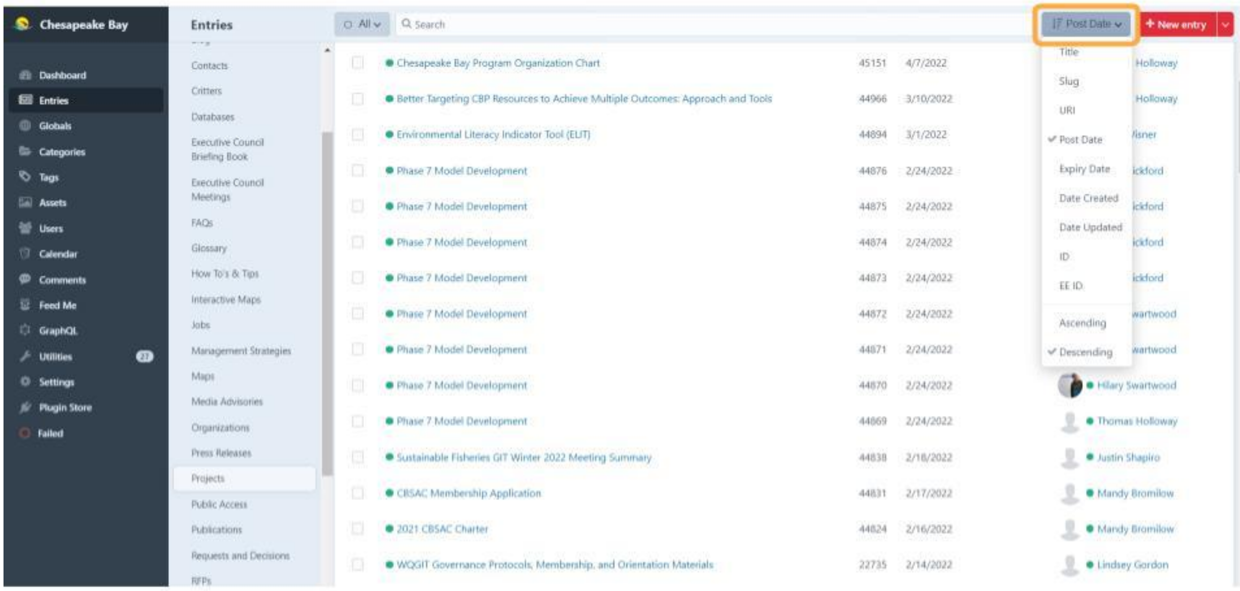
- Note: The CMS automatically sorts existing projects by the date on which their entries were published. To sort existing projects by another characteristic (e.g., Title), click the **[Sort By] Post Date** button (Screenshot 5.4).

Screenshot 5.3



Screenshot 5.3 shows the options a user would select to edit the Diversity Workgroup's GIS Tools Project.

Screenshot 5.4



Screenshot 5.4 shows the options a user could select to re-order the list of Projects within the CMS.

To publish your revisions, click the **Save** button.

- Note: The Save button features a drop-down menu that allows for additional actions, including **Save and continue editing,** i.e., publish the changes you've made thus far, but remain in the CMS to make more.

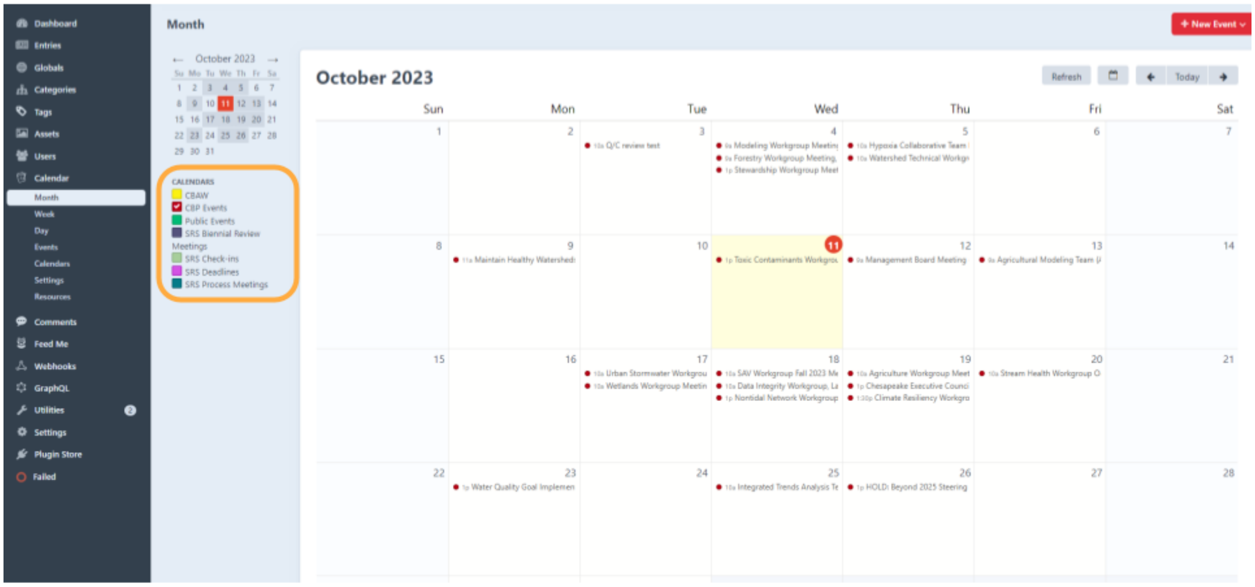
6. Add, Edit, or Remove a Calendar Event

The CMS contains six event types, grouped into distinct **Calendars.**

- **CBAW:** Events that populate the Chesapeake Bay Awareness Week Calendar.
- **CBP Events:** Events that populate the Chesapeake Bay Program's Meetings Calendar. (Most individuals will only add, edit, or remove this event type.)
- **SRS Biennial Review Meetings:** Meetings that begin each two-year SRS cycle.
- **SRS Process Meetings:** Meetings that are part of each two-year SRS cycle.
- **SRS Check-ins:** Check-ins between Outcome Leads and the SRS Planning Team.
- **SRS Deadlines:** Due dates for SRS materials.

The CMS automatically displays all available Calendars when you log in. To hide or display a Calendar, check or deselect the box to the left of the Calendar name **(Screenshot 6.1).**

Screenshot 6.1

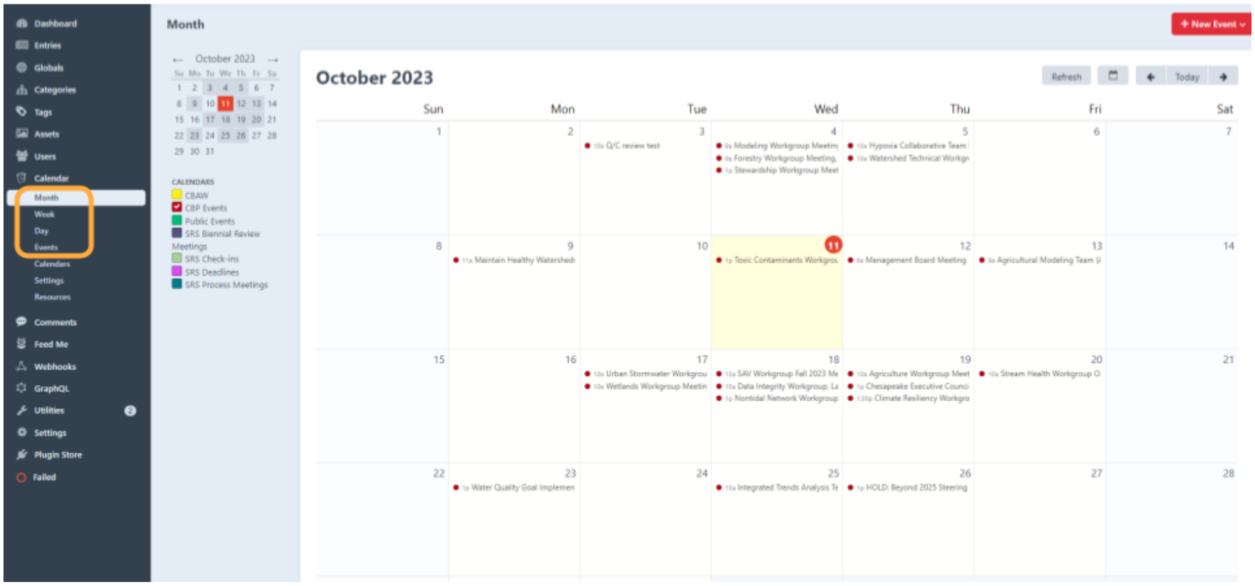


Screenshot 6.1 shows the options a user can select to change the Calendars that are displayed by the CMS. In this example, only CBP Events—or those events that populate the Chesapeake Bay Program's [Meetings Calendar]—are shown.

The CMS displays events in **Month** view by default, showing all of the events scheduled to occur during the current month. Events can also be displayed by **(Screenshot 6.2):**

- **Week:** Displays all events scheduled to occur during the current week.
- **Day:** Displays all events scheduled to occur during the current day.
- **Events:** Displays a list of all events, automatically sorted by Title. To sort existing events by some other characteristic (e.g., Start Date), click the **[Sort By] Title** button.

Screenshot 6.2

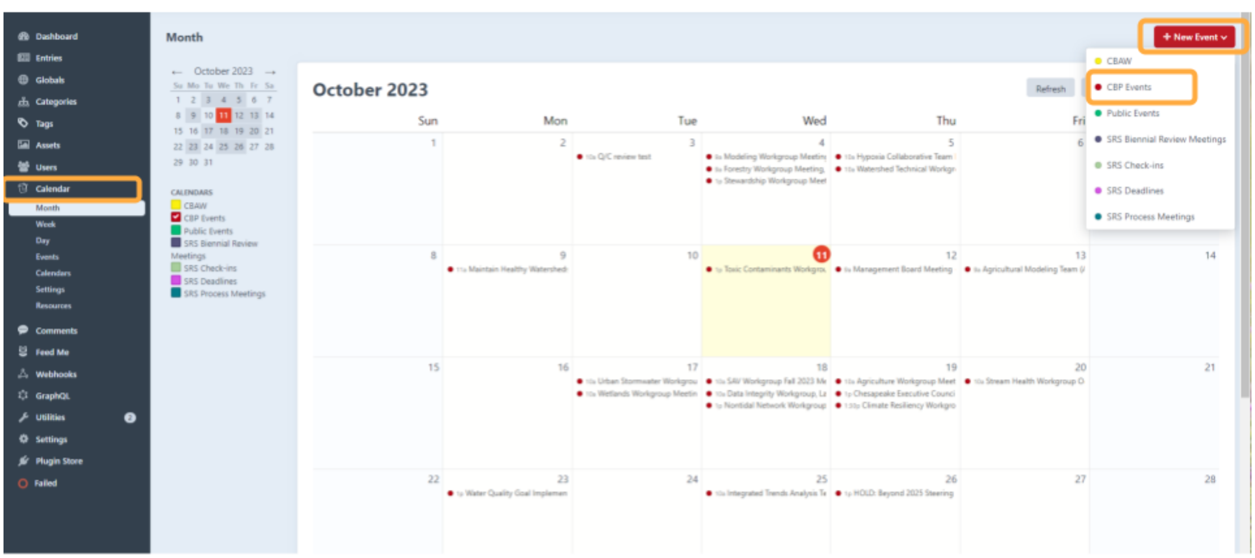


Screenshot 6.2 shows the options a user can select to change the way events are displayed within the CMS.

Add a Calendar Event

From the Dashboard, select **Calendar.** Click **+ New Event,** and select the appropriate calendar (most likely **CBP Events**) from the drop-down menu **(Screenshot 6.3).**

Screenshot 6.3



Screenshot 6.3 shows the options a user would select to add an event to the Chesapeake Bay Program's Meetings Calendar.

The **Content** tab of each event includes the following fields:

- **Date and Time:** The event date and time.
  - Never select **All Day** for events that will be added to the Chesapeake Bay Program's Meetings Calendar. This option should only apply to holidays and other occasions.
  - To create a multi-day event (e.g., one that spans from September 28-29), turn the **Multi-Day toggle** on.
- **Title:** The event title.
  - Please include the month and year of your event in the meeting title. Use a hyphen to separate the month and year from the meeting name (e.g., Management Board Meeting - September 2022). Do not use a comma or parenthesis.
- **Purpose:** A short description of the event
  - Event descriptions should state the goals of the event and the topics that will be discussed. At a minimum, descriptions for recurring GIT and Workgroup meetings should include the following statement: "This is the [monthly] [quarterly] [annual] meeting of the [GIT or Workgroup name]."
- **Location:** The event location.
  - Select the appropriate meeting room, conference platform, or other location from the **Location drop-down menu**. The **Location Description** field should contain useful information about the location, such as the link for a virtual conference room, or instructions for accessing a building. The **Map Location** field and **Show Map toggle** allows you to embed a map of your event's physical address on your event page.
- **Meeting Files:** Documents that support the event.
  - Files should be uploaded into one of four categories:
    - **Agenda,** or the agenda for the event. Only one file can be uploaded to this field.
    - **Presentations,** or presentations that will be delivered during the event.
    - **Supporting Documents,** or miscellaneous files.
    - **Meeting Minutes,** or the official notes from the event, often published after the event has occurred. Only one file can be uploaded to this field.
  - The **size limit** for all files uploaded to the CMS is 16MB. To add a file, click **+Files,** and then click **+ Add [an agenda, presentations, supporting documents, or meeting minutes].** To insert a file that has already been uploaded to the CMS, click **+ Add an asset.** To insert a new file, click **Upload a file.** To override a file's original title, add the desired title to the

    asset's **Title** field. (This can be particularly helpful for Management Board meetings, where file titles are often updated to include a reference number.)
  - A **.zip** containing all of your event's Meeting Files will be automatically generated and made available for download on your event page.
- **Related Videos:** Webinar recording(s) or other video(s) related to the event.
  - Click **+Add a video file** to select a video that has already been uploaded to the CMS, or to embed a video from YouTube or Vimeo.
  - The **Video Description** field should include a short description of your video, as well as any required credits.

The **Sidebar** tab of each event includes the following fields:

- **Contact Information:** A point of contact for the event.
- **Meeting Host(s):** The GIT(s), Workgroup(s), or other group(s) hosting the event.

Once you have completed the required fields, you can publish an event by clicking the **Save** button.

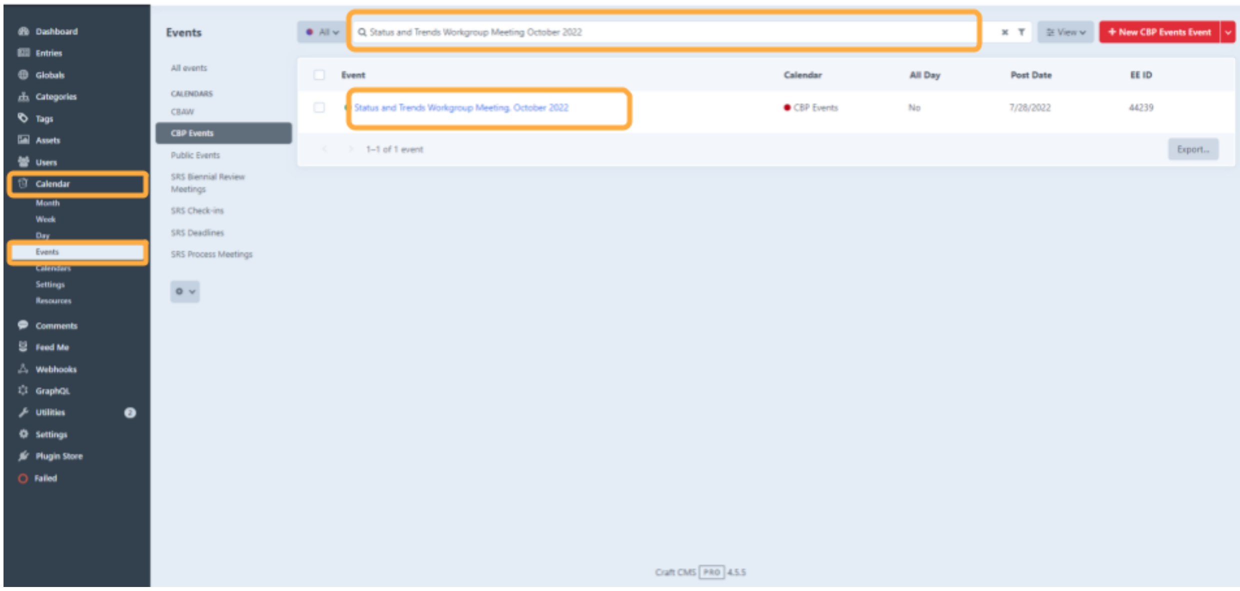
- The Save button features a drop-down menu that allows for additional actions, including **Save and continue editing**, i.e., publish the changes you've made thus far, but remain in the CMS to make more.

Note: As long as a calendar event has not yet occurred, its page will include an **Add to Calendar sidebar menu** that allows users to export the event's details to their calendar of choice. Exported events automatically include a link to the event page URL, as well as whatever information has been added to the Purpose and Location fields. However, **once an event has been exported, the information that has been added to a user's personal calendar will not change, even if you update the online source material.** For this reason, it is important to publish a new event with as much information as you can (and at minimum, an accurate, up-to-date "Purpose" and "Location").

Edit an Existing Calendar Event

From the Dashboard, select **Calendar.** If the event is not immediately visible in the CMS, select the **Events** view and use the **search bar** to find the event **(Screenshot 6.4).** From the search results, select **the name of the Event** whose information you wish to edit.

Screenshot 6.4



Screenshot 6.4 shows the options a user would select to edit an existing calendar event, as found by searching for the Meeting Title. In this example, the user searched for "Status and Trends Workgroup Meeting October 2022."

To publish your revisions, click the **Save** button.

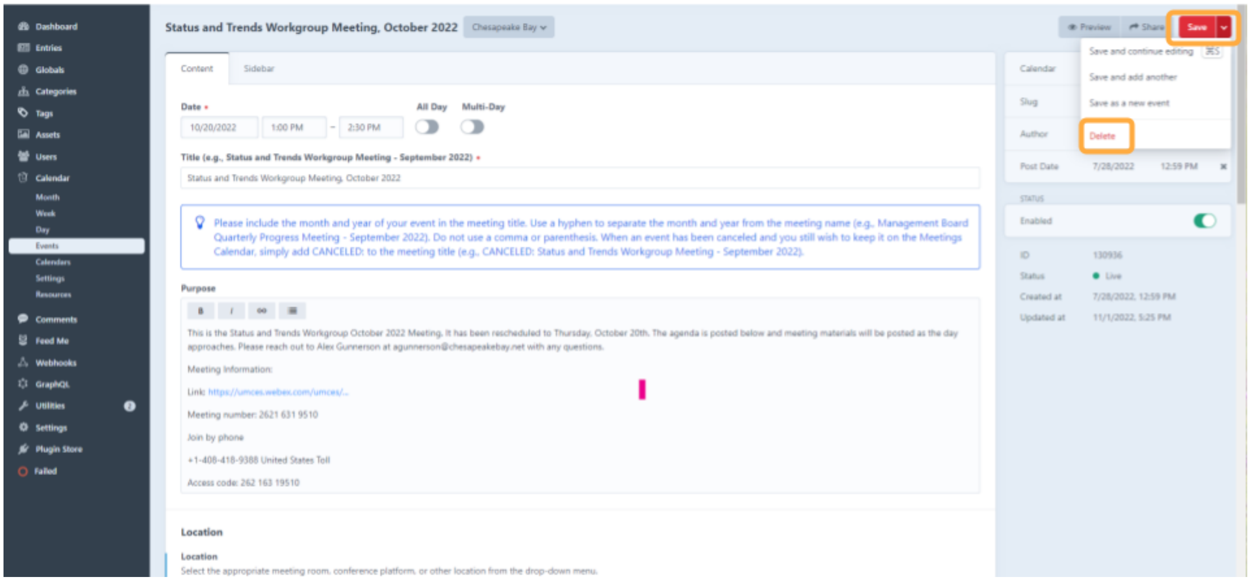
- The Save button features a drop-down menu that allows for additional actions, including **Save and continue editing**, i.e., publish the changes you've made thus far, but remain in the CMS to make more.

Remove a Calendar Event

From the Dashboard, select **Calendar.** If the event is not immediately visible in the CMS, select the **Events** view and use the **search bar** to find the event. From the search results, select **the name of the Event** whose information you wish to remove. Click the **Save button's drop-down menu**, and select **Delete (Screenshot 6.5).**

- When an event has been canceled and you still wish to keep it on the Chesapeake Bay Program's Meetings Calendar, simply add CANCELED: to the meeting title (e.g., CANCELED: Status and Trends Workgroup Meeting - September 2022).

Screenshot 6.5



Screenshot 6.5 shows the options a user would select to remove an existing calendar event from the CMS.

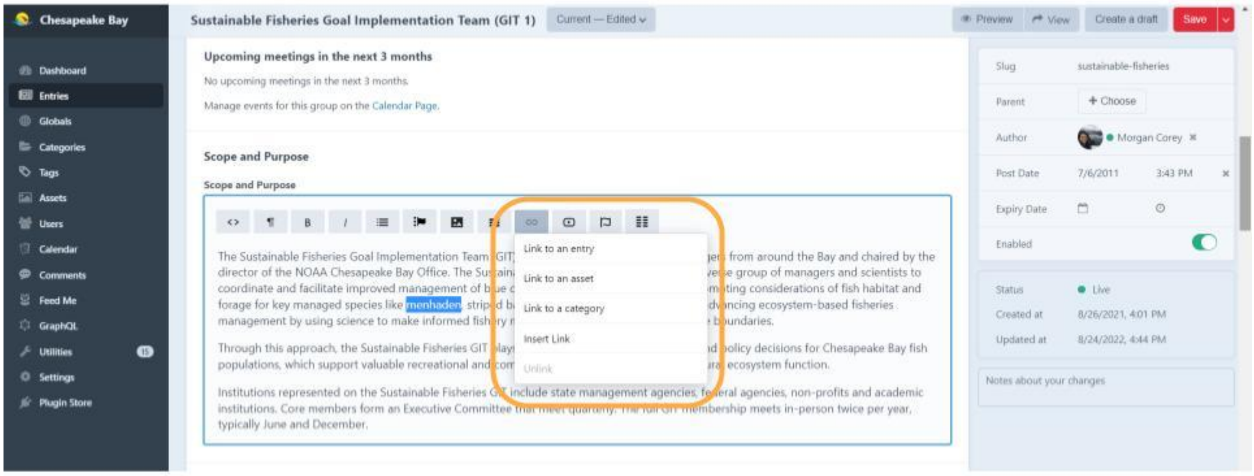
7. Insert a Text Link to Internal Content

Using the CMS to insert links to internal content (i.e., content that is located on ChesapeakeBay.net) ensures such links will continue to function even if the URL of the linked page were to change.

To insert a link, **highlight the text** that will be linked, click on the **link button** in the editing toolbar, and select the appropriate link type (Screenshot 7.1):

- **Link to an entry** in order to insert a link to a webpage (i.e., Group page, Field Guide entry, blog post, etc.).
- **Link to an asset** in order to insert a link to a file (i.e., image, Excel spreadsheet, PDF, etc.).

Screenshot 7.1



Screenshot 7.1 shows the linking options that are available in the editing toolbar.

Note: Clear and accessible link text makes it easier to navigate a page. Link text should be descriptive, but should also be kept as short as possible. Don't use "click here" or "read more," and don't link entire sentences or paragraphs. Visit PlainLanguage.gov to learn more about [writing effective links](#).