A Staffer's Guide to the ChesapeakeBay.net Content Management System

Content management systems are tools that allow multiple contributors to create, manage, and modify web content. All staffers have some level of CMS access, and must receive CMS training.

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Your Role As a Content Editor

As content editors, **staffers are responsible for keeping their groups' web content up-to-date.** This includes publishing meetings and related files, as well as projects, publications, and other GIT, Workgroup, and Action Team deliverables. Whenever possible, please follow best practices for web writing and accessibility.

In addition to this manual, which provides step-by-step instructions for creating and revising content on ChesapeakeBay.net, staffers should become familiar with the following guides:

- The **Chesapeake Bay Program Style Guide** provides guidance for the program's written communications. It includes information about:
    - Our organizational voice;
    - The terms we use;
    - The standards we follow when writing web content;
    - The process we follow when updating our blog;
    - The process we follow when updating ChesapeakeProgress;
    - The aspects of inclusivity we look out for in our communications; and
    - The appropriate use of our logo.
- **Accessibility Best Practices** provides tips, tricks, and resources for making our web content, internal and external communications, and meetings and events useful to as many people as possible, and especially to people with disabilities.

Quick Tips

- Fields that are marked with a **red asterisk** are required.
- The **Preview button** splits your view of the CMS into a simplified editing window on the left and a live preview of your revisions on the right.
- **Event titles should always include the event's month and year.** The event title directly informs the event page's URL, and including the month and year makes it more likely the URL will be descriptive and unique (e.g., /wastewater-treatment-workgroup-meeting-april-2025).
- You do **not** need to mention that meetings are **open to the public,** that meetings **may be recorded,** or that meeting **materials will be posted as they become available.** All of the events in our Meetings Calendar include statements to this effect.
- The **size limit for all files** uploaded to the CMS is 16MB. **File names should be clear and descriptive.** For example:

❌April-13-MB-Agenda-V1.pdf	✅Management-Board-Agenda-April-13-2022.pdf
❌April-Meeting-Powerpoint.pptx	✅Climate-Resiliency-Workgroup-Meeting-Slides-April-2025.pptx
❌Wolf_STAR_Presentation_042425.pdf	✅Interconnectivity-Presentation-to-STAR-April-2025.pdf
❌Phase_I_Final_Report.pdf	✅TMDL-Forest-Retention-Study-Phase-I-Report-September-2015.pdf
❌Meeting_Minutes.pdf	✅Forestry-Workgroup-Meeting-Minutes-August-2016.pdf

Sample Content

The following screenshots show you **what's possible** on the pages you're responsible for creating and keeping up-to-date. Please **use them as a model for your work,** and contact Catherine Krikstan with any questions about how to implement what you see.

- Sample Group Page: Birdwatching Workgroup
- Sample Group Page: Bird Habitat Funders Action Team
- Sample Calendar Event: Birdwatching Workgroup Meeting - April 2025
- Sample Project: Bird Habitat Targeting Tool
- Sample Publication: Effects of Shoreline Hardening on Chesapeake Bay Shorebirds and Waterfowl

Web Resources

Visit the Web Development & Support page to report a bug; request web, design, or user research support; and access useful resources. You may also contact Catherine Krikstan for assistance with a request.

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.

For further assistance, contact Catherine Krikstan.

2. Edit a Group Page

- *Sample Group Page: Birdwatching Workgroup*
- *Sample Group Page: Bird Habitat Funders Action Team*

From the Dashboard, select **Entries**. Under STRUCTURES, select **Groups.** From the list of Groups, select **the name of the Group** you want to edit. You can also use the search bar to find a specific Group page.

Most of the information that can be found on a Group page is located under the **Content** tab. However, staffers must also keep the following tabs up-to-date: **Contacts, Watershed Agreement,** and **Members.**

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

- **Title:** Full group name.
- **Group Type:** Type of group.
- **Blurb:** A one- to two-sentence description of the group's purpose.
- **Meetings:** Meetings associated with the group.
    - This list is populated automatically. See Section 3 for instructions on managing calendar events.
- **About:** A detailed description of the group and its work.
    - This can include information about the group's origin, scope, and current priorities. You can add images and use headings to organize different sections of text. If you use headings, remember to add them in the appropriate numerical order.
- **Projects:** Current or past projects the group led or contributed to.
    - All of the projects listed here will appear in a group's projects archive. However, only the top five will appear on the group's webpage.
    - To remove a project, click the **...** next to the project name and select **x Remove.** To add a project, click **+ Add a project** and select from the pop-up list. See Section 5 for instructions on adding projects to the CMS.
- **Publications:** Publications the group authored or contributed to.
    - All of the publications listed here will appear in a group's publications archive. However, only the top five will appear on the group's webpage.
    - To remove a publication, click the **...** next to the publication name and select **x Remove.** To add a publication, click **+ Add a publication** and select from the pop-up list. See Section 6 for instructions on adding publications to the CMS.
- **Related Resources:** Up to 10 relevant resources.

- Resources can be existing pages on ChesapeakeBay.net (**Entry**), external websites (**URL**), or files in our Asset Library (**Asset**). Use the **Label** field to provide a clear and descriptive link name.

The **Contacts** tab lists up to two points of contact for the group.

The **Watershed Agreement** tab lists the Outcomes for which the group is a lead (if applicable).

The **Members** tab lists the group's members, arranged into the following categories: Chair, Vice Chair, Coordinator, Staff, and Members.

- To remove a member, click the **...** next to their name and select **x Remove.**
- To add a member, click **+ Add an entry** and select from the pop-up list.
- To export a Group's complete member list—including each member's name, email address, phone number, organization, and role—click **Download Members (.csv).**

See Section 4 for instructions on adding new contacts to the CMS.

When you're done editing, click the **Save** button.

- The Save button's drop-down menu allows for additional actions, such as **Save and continue editing**, which saves your revisions but keeps you in editing view.

To add, remove, or modify a GIT's sub-groups (i.e., the Workgroups or Action Teams that our organizational chart has placed "within" a larger GIT) or **to add a Mailchimp newsletter subscription form to your Group's webpage**, **contact Catherine Krikstan.**

3. Add, Edit, or Remove a Calendar Event

- *Sample Calendar Event: Birdwatching Workgroup Meeting - April 2025*

The CMS supports seven event types, each associated with a specific Calendar. Staffers should **only** add, edit, or remove events from **CBP Events,** which populates the Chesapeake Bay Program's Meetings Calendar. However, the CMS automatically displays all Calendars when you log in. Use the checkboxes next to each calendar name to show or hide them.

Events are shown in **Month** view by default. You can also display events by:

- **Week:** Events scheduled to occur during the current week.
- **Day:** Events scheduled to occur during the current day.
- **Events:** All events, automatically sorted by Title.

Meetings Calendar Criteria

The Chesapeake Bay Program's Meetings Calendar is the home for public meetings hosted by GITs, Workgroups, Action Teams, and other Chesapeake Bay Program groups. In this way, the Meetings Calendar supports the program's commitment to hosting open meetings, with advance notification of the date, time, location, agenda, and materials, and—after the meeting—a summary of actions and decisions.

The Meetings Calendar does **not** contain meetings hosted by Chesapeake Bay Program partners, or non-public meetings between office staff.

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.

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

- **Date and Time:** Event date, start time, and end time.
    - Do **not** select **All Day** for CBP Events.
- **Title:** Event title.
    - Always **include the event's month and year** in the event title. The event title directly informs the event page's URL, and including the month and year makes it more likely the URL will be descriptive and unique (e.g., /wastewater-treatment-workgroup-meeting-april-2025). Use a hyphen to

separate the month and year from the event name (e.g., Management Board Meeting - September 2025). Avoid commas or parentheses.

- **Purpose:** A short description of your meeting's goals or primary discussion topics.
  - Well-written descriptions will make your meetings easier to search for and find. ("When did we discuss...?") At a minimum, recurring GIT and Workgroup meetings should include the following statement: "This is the [monthly] [quarterly] [annual] meeting of the [GIT or Workgroup name]."
- **Location:** Event location.
  - Select the appropriate meeting room, conference platform, or other location from the **Location drop-down menu.**
  - Use **Location Description** to share call-in details or instructions for finding or accessing a building. **When including call-in details, please use one of the templates below.**
    - Template for Microsoft Teams, e.g., Federal Facilities Workgroup Meeting - April 2025:
      - **Join the meeting via Microsoft Teams.**
      - **Meeting ID:** 218 619 354 17 | **Passcode:** QVyyfq
      - **Call:** +1 469-208-1525 | **Phone Conference ID:** 212 050 145#
    - Template for Google Meet, e.g., Invasive Catfish Workgroup Meeting - May 2025:
      - **Join the meeting via Google Meets** or call (US) +1 530-481-6051 (PIN: 357 866 716#).
  - The **Map Location** field and **Show Map toggle** allow 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 select **+ New entry** under the appropriate section. 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.**

    - **File names** should be clear and descriptive. For example, Backgrounder: Shad in the Chesapeake Bay is a more descriptive file name than cbp_12244.pdf. Use the asset's **Title** field to override original file names.
    - 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 link** 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.
- **Slug:** The part of the page's URL that serves as its unique identifier on ChesapeakeBay.net.
    - Slugs are automatically generated by the CMS using your event's title (e.g., Wastewater Treatment Workgroup Meeting - April 2025: /wastewater-treatment-workgroup-meeting-april-2025). Before you publish the event, make sure the slug is correct and does not contain errant punctuation marks, numbers, or other characters.

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

- **Contact Information:** A point of contact for the event, often a staffer or coordinator.
- **Meeting Host(s):** The GIT(s), Workgroup(s), or other group(s) hosting the event.
    - Listing a GIT or Workgroup here ensures an event will appear on a group's webpage and in a group's meeting archive.

When you're ready to publish, click **Save.**

- The Save button's drop-down menu allows for additional actions, such as **Save and continue editing,** which saves your revisions but keeps you in editing view.

Note: As long as a calendar event has not yet occurred, its page will include an **Add to Calendar** option that allows users to export the event's details to their calendar of choice. Exported events automatically include a link to the event URL and information from the Purpose and Location fields. **Exported calendar events do not update automatically.** So it is important to publish a new event with complete and accurate information up front.

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. From the search results, select **the name of the Event** you wish to edit.

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

- The Save button's drop-down menu allows for additional actions, such as **Save and continue editing,** which saves your revisions but keeps you in editing view.

Remove a Calendar Event

When an event has been canceled, you may choose to:

- Add CANCELED: to the meeting title (e.g., CANCELED: Status and Trends Workgroup Meeting - September 2022); or
- Remove it from the CMS.

To remove an event, contact Catherine Krikstan.

4. Add or Edit a Contact

Depending on their role at the Chesapeake Bay Program, Contacts can appear on a Group page, our Office Staff page, and our Partnership Directory.

Add a Contact

From the Dashboard, select **Entries**. Under CHANNELS, select **Contacts.** Click **+ New entry.**

- All contacts must include a **First Name, Last Name,** and **Email Address**.
- Use the **Organizational Affiliation** field to specify where the contact works. Click **+ Add an entry** and select from the pop-up list. If your contact's organization isn't listed, click **+ New Organization entry** to add it.

To publish a Contact, click **Create entry.**

- The Create entry button's drop-down menu allows for additional actions, such as **Create and continue editing,** which publishes your entry but keeps you in editing view.

If your new contact is a Chesapeake Bay Program staff member, contact Catherine Krikstan.

Edit an Existing Contact

From the Dashboard, select **Entries**. Under CHANNELS, select **Contacts.** From the list of Contacts, select **the name of the Contact** you want to edit. You can also use the search bar to find a specific Contact.

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

- The Save button's drop-down menu allows for additional actions, such as **Save and continue editing,** which saves your revisions but keeps you in editing view.

5. Add or Edit a Project

- *Sample Project: Bird Habitat Targeting Tool*

Project Criteria

Projects are designed to showcase a group's work, from new decision-support tools and mapping applications to communications toolkits and workshop reports.

Add a Project

From the Dashboard, select **Entries**. Under CHANNELS, select **Projects.** Click the **+ New entry.**

Most of the information that can be found on a Projects page is located under the **Content** tab. However, staffers must also keep the **Sidebar** and tab up-to-date.

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

- **Title:** Project name.
- **Status:** An indicator of whether the project is in progress or complete.
- **Blurb:** A one- to two-sentence description of the project.
    - These descriptions also appear in your group's projects archive.
- **Detailed Description:** A detailed description of the project. Consider including information about the project's goals, timeline, and milestones, as well as images of the project itself. If you use headings to organize different sections of text, remember to add them in the appropriate numerical order.

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

- **Project Resources:** File(s) in our Asset Library (**Asset**) or external documents or websites (**URL**).
    - The **size limit** for all files uploaded to the CMS is 16MB. **File names** should be clear and descriptive. For example, Backgrounder: Shad in the Chesapeake Bay is a more descriptive file name than cbp_12244.pdf.
- **Lead Group:** The primary GIT, Workgroup, or Action Team responsible for the project.
- **Contributing Groups:** Additional GITs, Workgroups, or Action Teams involved in the project.

Edit an Existing Project

From the Dashboard, select **Entries.** Under CHANNELS, select **Projects.** From the list of Projects, select the **name of the Project** whose page you want to edit. You can also use the search bar to find a specific Project.

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

- The Save button's drop-down menu allows for additional actions, such as **Save and continue editing,** which saves your revisions but keeps you in editing view.

6. Add or Edit a Publication

- *Sample Publication: Effects of Shoreline Hardening on Chesapeake Bay Shorebirds and Waterfowl*

Publication Criteria

Publications are **formal documents** published by the Chesapeake Bay Program or a specific GIT, Workgroup, or Action Team. They appear in our Publications library and provide information about the program, its priorities, and its progress.

Do **not** use Publication entries for:

- **Ephemeral files** with no lasting business, legal, or historical value.
- **Informal files** that aren't part of the official Chesapeake Bay Program record.
- Files intended for a **limited or internal audience.**

To create a web link for non-Publication files, contact Catherine Krikstan.

Add a Publication

From the Dashboard, select **Entries**. Under CHANNELS, select **Publications.** Click **+ New entry.**

Most of the information that can be found on a Publication page is located under the **Content** tab. However, staffers must also keep the **Sidebar** and **Categories** tabs up-to-date.

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

- **Title:** Publication name.
- **Publication Date:** If unknown, consider using the date the publication was uploaded to the website.
- **Blurb:** A one- to two-sentence description of the publication.
  - These descriptions also appear in your group's publications archive and in your Publications library.
- **Authors:** The individuals, agencies, or organizations that authored the publication. (This differs from the publication's contributing GITs, Workgroups, or Action Teams, which can be added through the **Sidebar** tab.)
- **Description:** A detailed description of the publication. If the publication is a scientific paper, consider including the abstract here. This section can also include acknowledgements and a suggested citation. If you use headings to

organize different sections of text, remember to add them in the appropriate numerical order.

- **Publication File:** A file in our Asset Library (**Asset**) or an external document (**URL**).
    - The **size limit** for all files uploaded to the CMS is 16MB. **File names** should be clear and descriptive. For example, [Backgrounder: Shad in the Chesapeake Bay]() is a more descriptive file name than cbp_12244.pdf.

The **Sidebar** tab indicates the GITs, Workgroups, or Action Teams responsible for the publication. This differs from the publication's author(s), which can be added through the **Content** tab.

- Adding a GIT or Workgroup here does **not** link a publication to a group's webpage or publications archive. To do that, you must edit the group's page directly. See [Section 2]() for instructions on editing a Group page.

The **Categories** tab indicates the Publication Type, which helps users find documents in our [Publications library](). To categorize a publication, click **+ Add a category** and select from the pop-up list. Categories include:

- **Adoption Statement:** Formal declarations that outline accepted standards, practices, or policies.
- **Agreement:** Environmental agreements, resolutions, and similar commitments between Chesapeake Bay Program partners.
- **Backgrounder:** Contextual documents often paired with a press release.
- **Directive:** Guidance from the Chesapeake Executive Council for Chesapeake Bay Program actions.
- **Environmental Assessment:** Summaries of Chesapeake Bay health and conservation and restoration activities.
- **Fact Sheet:** Quick-reference information about science, restoration, and stewardship initiatives.
- **Management Strategy:** The means for accomplishing a *Chesapeake Bay Watershed Agreement* Outcome.
- **Map:** Visual illustrations of geographic information and geospatial data.
- **MOU/MOA:** Documentation of collaborative relationships between Chesapeake Bay Program partners.
- **Policy Memorandum:** Analyses and recommendations for policy adoption.
- **Report:** Progress toward an objective, analyses to inform decision-making, and/or knowledge on a specific subject.

To publish a Publication, click **Create entry.**

- The Create entry button's drop-down menu allows for additional actions, such as **Create and continue editing,** which publishes your entry but keeps you in editing view.

Edit an Existing Publication

From the Dashboard, select **Entries**. Under CHANNELS, select **Publications.** From the list of Publications, select **the name of the Publication** you want to edit. You can also use the search bar to find a specific Publication.

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

- The Save button's drop-down menu allows for additional actions, such as **Save and continue editing,** which saves your revisions but keeps you in editing view.

7. Insert an Image

Certain webpages, including Group and Project pages, allow content editors to embed images on the page. To do so, find the **Content Matrix** section of the page. Click **+ New entry** and select **Image** from the dropdown menu. 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.**

- Use the **Caption** field to write text that will be displayed immediately below the image.
- Use the **Image Alt Text** field to write a textual substitute for the image. (See Creating Accessible Images for instructions on writing alt-text.)
- Use the **Description for Complex Images** field **only if** the image is so complex that a succinct blurb of alt-text cannot sufficiently describe it.

The image **caption** will automatically include the image **credit,** if it is given one. To credit an image, double-click the file itself and fill out the **Credit** field. Accreditation should be formatted as follows: Photo by Name/Organization. (For example, "Photo by Will Parson/Chesapeake Bay Program.) Do **not** include parentheses around this text.

Creating Accessible Images

Informational images—or those that convey content, such as featured photographs, charts, maps, and infographics—should be perceptible by all users, including those who are colorblind, low-vision, or have other visual or cognitive disabilities. Following these best practices will help you create more accessible images:

- **Avoid using color as the sole means of conveying information.** In addition to color, use text, patterns, and/or shapes to communicate ideas. This will ensure the image will retain its meaning even when the colors are removed.
- Use an **online color blindness simulator** (such as Colblis or the Colorblindly Chrome extension) to ensure your image will retain its meaning when viewed by users who are colorblind.
- If applicable, use the WebAIM Contrast Checker to **ensure your image presents text and other components with sufficient contrast.** According to the World Wide Web Consortium, images of text should have a contrast ratio of at least 4.5:1. Images of graphical objects, such as icons or charts, should have a contrast ratio of 3:1. (Online tools such as RedKetchup or the Color Picker Tool Chrome extension can help you identify the color of different aspects of your image.)

- If applicable, revise the design of your chart to **ensure labels are both legible and descriptive.** For example, replace generic chart and axis labels with meaningful text; improve the legibility of each axis by adjusting their positions, tick marks, and other characteristics; and make sure all text is presented with sufficient contrast in a 12-point or larger sans serif font.
- If applicable (i.e., for images that are not considered decorative), **add appropriate alt-text.** Alt-text, or alternative text, is a textual substitute. Screen readers announce alt-text in place of images, browsers present alt-text if an image fails to load, and search engines consider alt-text when assessing a page. Alt-text should:
    - **Be succinct.** Alt-text shouldn't be longer than a sentence or two. Oentimes, a few thoughtfully selected words will suffice.
    - **Clearly represent the content and function of an image,** including what it depicts and what it means within the context of the page. Consider what's important about the image. The setting? The emotions on people's faces? The colors or relative sizes of certain objects?
    - **Not include phrases like "image of...,"** which would be redundant.
- If applicable (i.e., for complex images), **include a more detailed text alternative than can be captured by alt-text alone.** For example, include a bulleted list of a map's geographic points; include a data table that conveys the information illustrated in your chart, graph, or map; or simply include a longer description, such as the one paired with our Food Web infographic on ChesaepakeBay.net.

Learn more about accessible webpage images on WebAIM.

8. Link to Content on ChesapeakeBay.net

When linking to **internal content** (i.e., pages or files hosted on ChesapeakeBay.net), use the **Link to an entry** or **Link to an asset** options to ensure such links remain functional even if the destination URL changes.

To insert a link, **highlight the text** that will be linked, click on the **link icon** in the editing toolbar, and select the appropriate link type:

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

Creating Accessible Links

Clear, functioning, and accessible links are one of the most important parts of a webpage. Following these best practices will help you create more accessible links:

- **Be concise** when choosing the text that is hyperlinked, so users can quickly determine whether the link will direct them to the information they're looking for.
- **Be descriptive,** so users know where the link will take them.
- **Use text that makes sense to a user out of context,** i.e., when pulled out of the surrounding paragraph.
- **Avoid using the same words or phrases** as other, different links appearing on the same page.
- **Avoid using unintelligible URLs** (i.e., those that contain strings of numbers, letters, ampersands, dashes, and other characters that make little sense to the average user) instead of human-readable text, unless the product is likely to be printed.

For example:

- Instead of "Click here to access our calendar," consider: "Visit our Meetings Calendar."
- Instead of "This page explains what you can do to help protect the Chesapeake Bay," consider: "Learn how to help protect the Chesapeake Bay."
- Instead of "Narrative-Analysis RFB 11 22 22.pdf," consider: "Riparian Forest Buffers Narrative Analysis (PDF)."

For additional guidance on writing effective links, visit PlainLanguage.gov.