

Chesapeake Bay Outreach Campaign Database User Guide

Prepared for Chesapeake Bay Trust



by

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Introduction

This document provides general information on use and management of the Chesapeake Bay Outreach Campaign Database.

Users

The website has 2 different types of authenticated users:

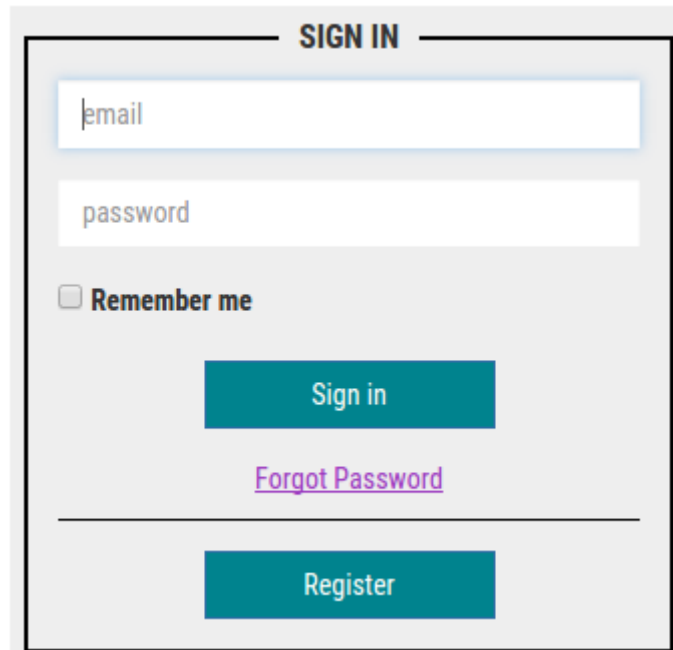
1. Admin
2. Campaign User (Non-Admin)

The **Admin** user has the greatest level of access to the site. This user can manage all content of the site via the CMS

The **Campaign User** cannot access the CMS and can only create campaigns.

Logging In

All users can login at /explore (<http://cbtrust-dev-com.tatnet.net/explore>, note the domain may be different) using the left side block.



The image shows a user login form titled "SIGN IN". It contains two input fields: "email" and "password". Below the password field is a checkbox labeled "Remember me". There are three buttons: a teal "Sign in" button, a purple "Forgot Password" link, and a teal "Register" button. The form is enclosed in a light gray border.

User Login Block

Resetting Password

Users may reset their password using the **Forgot Password** link in the *User Login Block*. The user will then be prompted with their email address in which an email will be sent to with a reset password link.

Registration

Users can register as a **Campaign User** by clicking on the Register button. This will bring the user to the Registration page. The user can then fill out the Registration form on the page and begin creating Campaigns.

Note that only an **Admin** user can create another user with Admin permissions using the CMS.

CMS

The CMS or (Content Management System) allows for configuration of pages, text blocks, menus, users, and more.

Content Management

Pages & News

Pages and News content types are the reading content of the site.

These content types consist of the following fields:

- Settings:
 - Published - Whether or not is viewable to public.
 - Publish Date Start - When to start being viewable to the public.
 - Publish Date End - When to end being viewable to the public.
- Title - Title of the Page/News Item.
- Alias - The URL to reach that page or news item.
- Meta Keywords & Description - HTML Meta tags for SEO.
- JavaScript - Custom JavaScript that is added upon loading that Page/News Item.
- Content - Main body.
- Summary (Specific to News)
 - Summary Image - Shown on the news listing page.
 - Summary - Excerpt to show on the news listing page.

Blocks

Blocks are dynamic pieces of content that are integrated into custom parts of the website.

There are two different types of blocks:

1. Image Block
2. Text Block

A Block consist of the following fields:

1. tag - This field should not be edited. It is used to identify where to plug the block's content into.
2. title - Header title of the text block.
3. image - Used for image block.
4. content - main content of text block.

You should only provide either an image or content for a block. The CMS will determine whether it is an **Image** block or **Content** block based on if an image is saved or not.

Block Notes

The following list describes the current blocks and where they are located on the site:

1. landing_welcome_and_purpose - landing page text block at the top of the page.
2. landing_welcome_image - Currently not visible to the users for design purposes.
3. landing_stat_image - Currently not visible to the users for design purposes.
4. user_registration_success_block - text block that is displayed after the user successfully registers to the site.
5. landing_page_background_image - landing page background image
6. campaign_sidebar_widget - text block that is displays under login/campaign menu widget. See
7. *Campaign Sidebar Widget* below.
8. campaign_form_help_widget - text block that that displays when a Non-Admin user is editing their Campaign content.

TIPS

This is my block for campaign sidebar.

Campaign Sidebar Widget

Campaigns

An Admin user can monitor Campaigns that are posted on the site. Admins can Block, Feature, and Delete any Campaign. Blocking a Campaign will hide it from the public view. Featuring a Campaign will list it on the landing

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page as well as place a star next to it on the Campaign search page. Deleting a Campaign will completely remove it from the site and it can NOT be recovered.

The Admin list view of Campaigns also notes if the Campaign is “live” or viewable by the public yet. It is up to the Campaigns owner to complete the required fields and change the status of the Campaign.

Partners

The Partners content type is used to generate the *footer* at the bottom of each page:



Footer

To create a Partner you must input the following:

1. Image - Used for display at bottom of page.
2. Name
3. Weight - Necessary for ordering/sorting.
4. Website URL - Used to link to the partners page.

Menus

The site has the following 3 menus:

1. Primary Navigation or Top Navigation
2. Footer Navigation
3. Help Quick Links

An Admin user can reorder a menu by drag and dropping using the hamburger (3 black lines) icon. The Admin can also delete a menu item using the red “x” button.

To create a menu item you simply click the green “Create New Item” and fill out the *Menu Item Form* and click the “Add Menu Item” button.

Menu Item

Title	About Us
Link Path	/about-us

FIND Link Target SAME TAB/WINDOW

ADD MENU ITEM

Menu Item Form

Site Configuration

Admins can manage particular internals of the site from the Site Configuration section of CMS.

Site Configuration

Site Configuration allows the Admin to manage values for specific line items on the site such as Footer Copyright tag, Contact Email, Site Name, and etc.

Global Scripts

The Global Scripts section allows the Admin to add Global JavaScript that is effective on all pages of the site.

Redirects

The Admin can also add redirects from page to page, meaning that if an Admin no longer wants a certain page to be available they can have it redirect to another page on the site.

User Administration

The Admin can manage the Users of the Site. Admins can Block, Delete, and Edit any user on the site. Blocking a User would prevent the user from logging in. Deleting a user would remove that user from the site permanently as well as remove their Campaign's from the site if that user created any.

Creating/Editing Users

Creating/Editing a user requires a valid email. Admins can also specify the permissions of that user.

Creating a new user will send an email to that user once the account is saved.