Mass. *Gov*

**Content Management
User Reference Manual**

Version 5.0 (Draft)

Last revision date:

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Change History

Author(s)	Change Description	Date Completed	Version No.
Barbara Casaly	Reformatted the manual to be compatible with online help, HTML, and on-screen access. Recaptured screens. Added the new CMA workflows.	July 2007	5.0
Lynne Kelley, Paula Collins, Bill Trevor	Revised and updated manual. Incorporated specification changes and portal upgrades. Includes new screenshots of portal structure and TeamSite 6.1.	April 2007	4.0
Bill Trevor	Revised and updated manual. Incorporated specification changes and portal upgrades. Includes new screenshots of portal structure and TeamSite 6.1.	March 2006	3.0
Ken Siegal	Incorporated updates necessary to reflect enhancements and bug fixes implemented recently. Added material to address frequently asked questions	August 2004	2.0
Susan Parker	Updated to reflect Constituent Model/Topic Model concepts (some updates made, but may not be complete – for example, in release 2.0 (below) may need to clarify how Mass.Gov (a Constituent Model site) is different from Constituent Model agency sites.	July 2004	1.2
Theresa Meyer	Updates to all sections based on Mass.Gov feedback	January 2004	1.1
Theresa Meyer	Creation of basic outline, template; Draft of section 1 through 13; Addition of appendices; Review by Mass.Gov and EOHHS	December 2003	1.0

Table of Contents

1 Introduction

The Content Management User Reference Manual is a teaching aid and reference manual for Mass.Gov and Executive Office content authors. It covers the Content Display Application (CDA) properties and use of both TeamSite and the Content Management Application (CMA) in the creation and maintenance of website navigation and content.

Content authors should be comfortable using Microsoft Word at an intermediate to advanced level. Though not required, a basic understanding of HTML and previous experience working with web editing tools, such as Dreamweaver, FrontPage, or HomeSite, is helpful.

Content Management User Roles

Table 1. Content Management User Roles

User Role	Description
Author	Creates new content, imports files, performs basic file operations, and submits (publishes) content to the production environment. Most TeamSite users are Authors.
Editor	Has the same capabilities as an Author and can approve content and modify content created by other users.
Administrator	Administers the technical infrastructure of the Mass.Gov or Executive Office level portal, including author/reviewer account and site administration.

Note: A person can have more than one user role.

Terms and Definitions

Table 2. Content Management Terms and Definitions

Term	Definition
CDA	(Content Display Application) The front-end view of the Mass.Gov portal that is displayed to public users.
CMA	(Content Management Application) The internal or back-end TeamSite application and database interface, which is used for creating, editing, and administering site navigation and content.
Portal	A unified website that provides an entry point into the information and services provided by the Commonwealth.
Category	Also referred to as Navigation Category, a collective name for all labels under which related content may be grouped. This includes Home, constituents, topics, subtopics and sub-subtopics. These categories create the navigational structure of the website.
Page Level	Also referred to simply as Level, indicates the user's depth within the website relative to the home page (level 0). Refer to "Page Levels in Constituent and Topic Model Sites" on page 2.
Home	The starting page for any portal or sub-portal (Executive Office or agency site).
Constituent Page	A grouping of topics and modules that meet the needs of a specific constituent group (for example, Resident, Business). On Constituent Model sites like Mass.Gov, this is a level 1 page. The constituent level page is similar to the home page of a Topic Model site. (Constituent Model sites only.)
Topic	A grouping of subtopics and resources related to a specific theme. Brief descriptions of subtopics and resources may be included to provide context.

Term	Definition
Subtopic	Lists resources (and potentially sub-subtopics) related to a specific subtopic, based on the constituent group and topic selected. Brief descriptions of each resource may be included to provide context.
Resource	Any discrete piece of content added to the content management application. This may be an XML chunk, a document, static text, or a hyperlink. It is also referred to as "terminal content" because once you reach this, you cannot continue on this path to any deeper level within the website.
Chunk	An XML file that is created using TeamSite Forms. These are also referred to as "terminal content." Chunks consist of formatted text that are created within TeamSite and can include graphics, links to documents, and other web pages, and can be reused in multiple places on the portal.
Pressrelease Chunk	A template used to customize the display of an agency's press releases (not available in all workareas).
Utility Chunk	Used for utility content, such as the Welcome Module and footer pages which include Site Policies, Help, and Contact Us.
Static Module	Content that can be repeated on successive page levels, but does not change to reflect context within the website. The content for these modules is stored in TeamSite XML files in a folder called staticmodulechunks. Examples include Feature Stories.
Clip Module	A module that relies on content "clipped" at regular intervals from a website or source outside of the portal environment. An example of this is the Lottery Module.
Breadcrumb	Breadcrumb navigation appears on all portal pages except the home page. As the user travels through the site, the breadcrumb navigation indicates the user's location within the site hierarchy. This is roughly equivalent to the click path. All items listed in the breadcrumb are active links.
Workarea	TeamSite workareas divide the content into separate agencies, providing a base level of content organization and specifying access to the content based on TeamSite login. Each state agency has at least one workarea, although some agencies have more than one workarea.
WYSIWYG	(What You See Is What You Get) The ability to see in the editor approximately what will appear when the user views the web page.

Page Levels and Modules

Page Levels in Constituent and Topic Model Sites

The Content Management System presents two models upon which to base site navigation: constituency based (Constituent Model) and topic based (Topic Model). The following table defines page levels by site model. Each level represents a click away from the site's home page. For example, a subtopic on Mass.Gov is Level 3, or three clicks from the home page.

Table 3. Page Levels in Constituent and Topic Models

Page Level	Constituent Model	Topic Model
Level 0	Home	Home
Level 1	Constituent	Topic
Level 2	Topic	Subtopic
Level 3	Subtopic	Sub-subtopic
Level 4	Sub-subtopic	
XML Resource	Terminal Content	Terminal Content

Constituent Model

A Constituent Model website has separate tabs to address the needs of specific constituent groups; for example, Residents, Businesses, Visitors, and Government.

Constituent Model Page Examples

The following figures show layouts of each page level. Refer to "Component Descriptions for Constituent Model Pages" on page 6 for a description of the components and modules on Constituent Model web pages.

Figure 1. Constituent Model Home (Level 0)
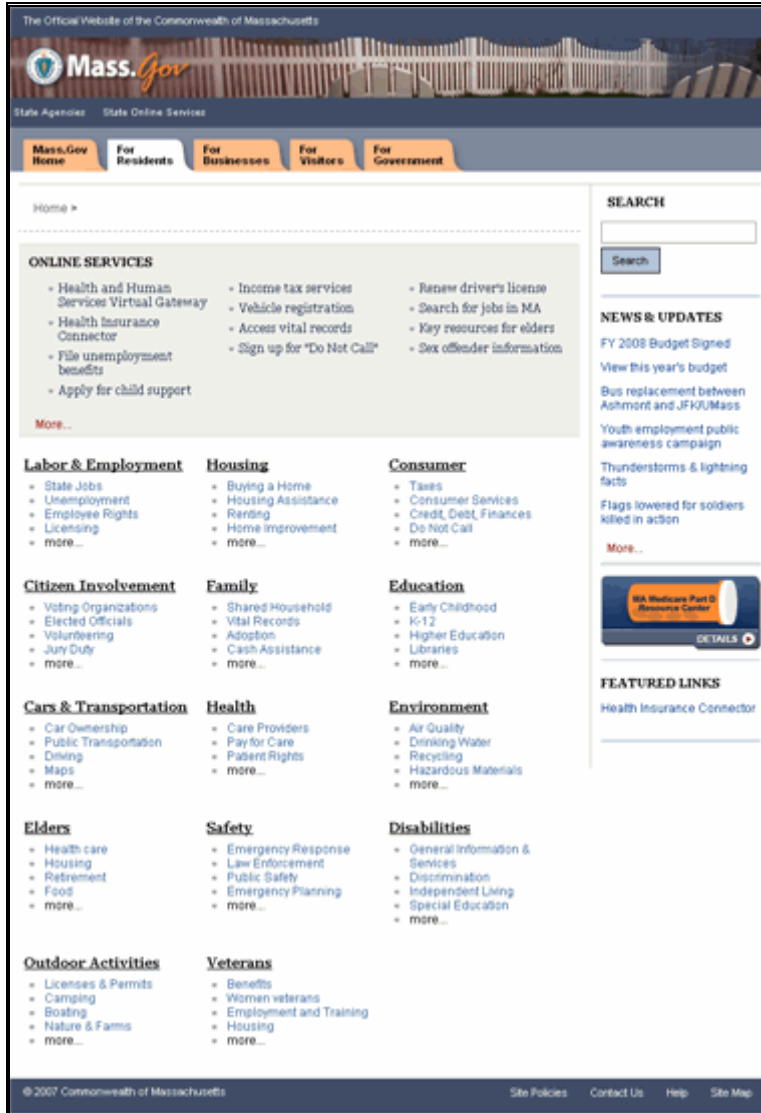
Figure 2. Constituent Model Constituent (Level 1)
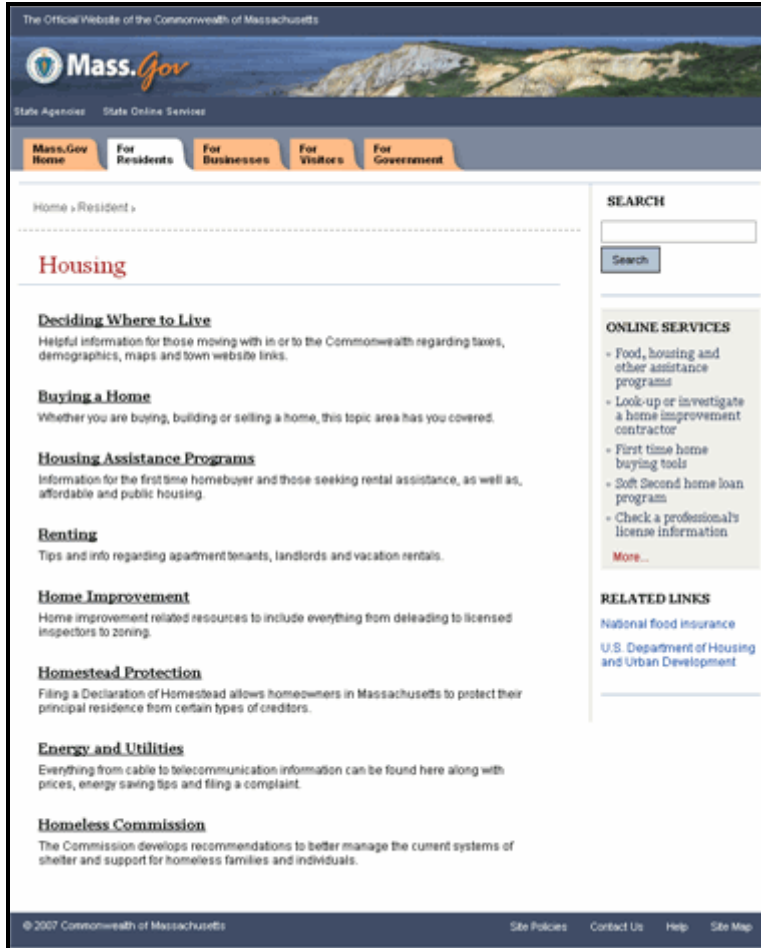
**Figure 3. Constituent Model Topic, Subtopic, and Sub-subtopic
(Levels 2, 3, and 4)**
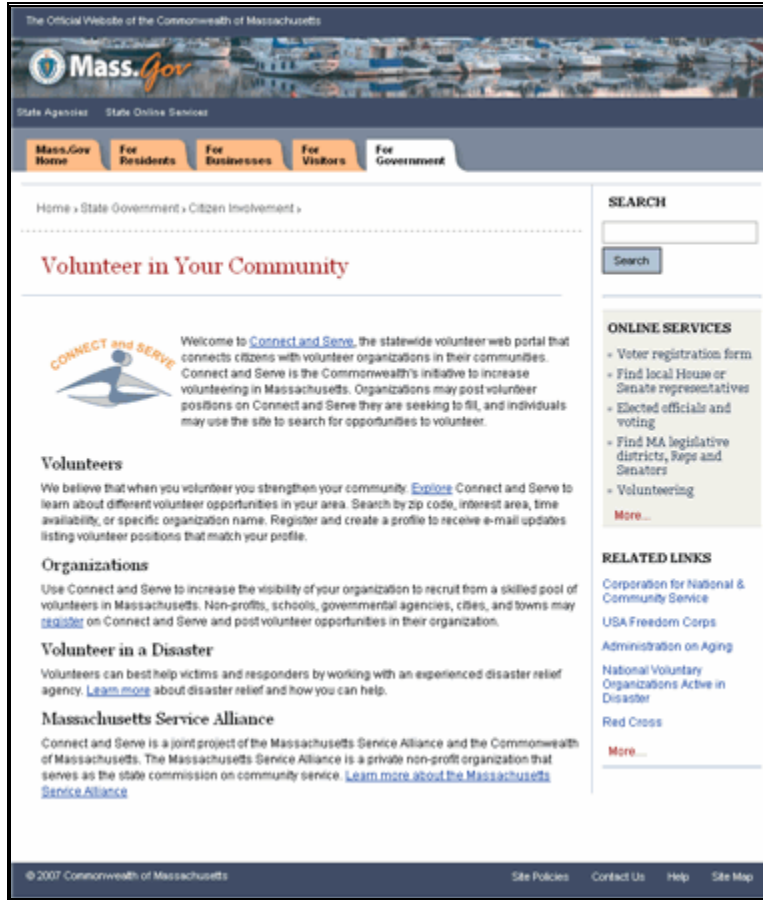
Figure 4. Resource/Terminal Content

Component Descriptions for Constituent Model Pages

Each page level can contain combinations of modules.

Table 4. Component Descriptions for Constituent Model Pages

Component	Description
Header	Provides an easy way for users to navigate back to the home page. When Mass.Gov is displayed in the agency banner, users can click on the text to go to the Mass.Gov home page.
Banner	An image or set of images that allows the user to identify a new agency page when he or she navigates to different content. Agencies can choose either one constant image or six or more images that change when the page is refreshed.
Breadcrumb	Provides the user with a sense of place within the portal and an easy means of navigating selectively backward. It is based on user location within the structure of the website, rather than actual click sequence.
Government Links module	Categorized by State, Local, and Federal Government. Provides information on branches of government and links to agency websites as well as city and town information and a link to USA.Gov.
Cities and Towns module	Links to Commonwealth Communities for resources on the selected city or town.
Mass Lottery module	Displays lottery results from the previous day clipped from the Mass Lottery website.

Component	Description
Online Services module	Displays a list of links to transactional online state government services appropriate to the user's context.
Feature Story module	Used for a weekly story about subjects of general interest.
Search module	Serves as an interface to Google's search.
News & Updates module	Displays headlines of recent news and updates along with links to the full stories.
Image Module	Displays an Image and the word Details, linking to a corresponding page.
Footer	Provides an easy way for users to link to portal utilities such as Site Policies, Contact Us, Help, and Site Map.
Constituent Center	Displays all topics assigned to the chosen constituent page. Under each topic a maximum of four subtopics are displayed to give an indication of what is found under this topic. By clicking the topic label or more…, a full list of subtopics under that topic is displayed.
Subtopics (bubble-ups)	Short names of subtopics or resources that are chosen to be displayed under the topic.
Featured Links module	Displays links to topics that enhance or relate to those in the center content of the page.
Related Links module	Displays links to topics that enhance or relate to topics on this page. Note: For Resource/Terminal Content pages, these modules are inherited from the parent category.
Page Title	On a topic, subtopic, or sub-subtopic page, the label given to the category in CMA. On a resource/terminal content page, the label given to the resource in CMA.
Terminal Content	The center content in a Resource/Terminal Content page, based on freeform text entered in the TeamSite template for content chunks.

Topic Model

Topic Model Page Examples

The following figures show layouts of each page level. Refer to "Component Descriptions for Topic Model Pages" on page 10 for a description of the components and modules on Topic Model web pages.

Figure 5. Topic Model Home (Level 0)

Figure 6. Topic Model Topic, Subtopic, and Sub-subtopic (Levels 1, 2, and 3)
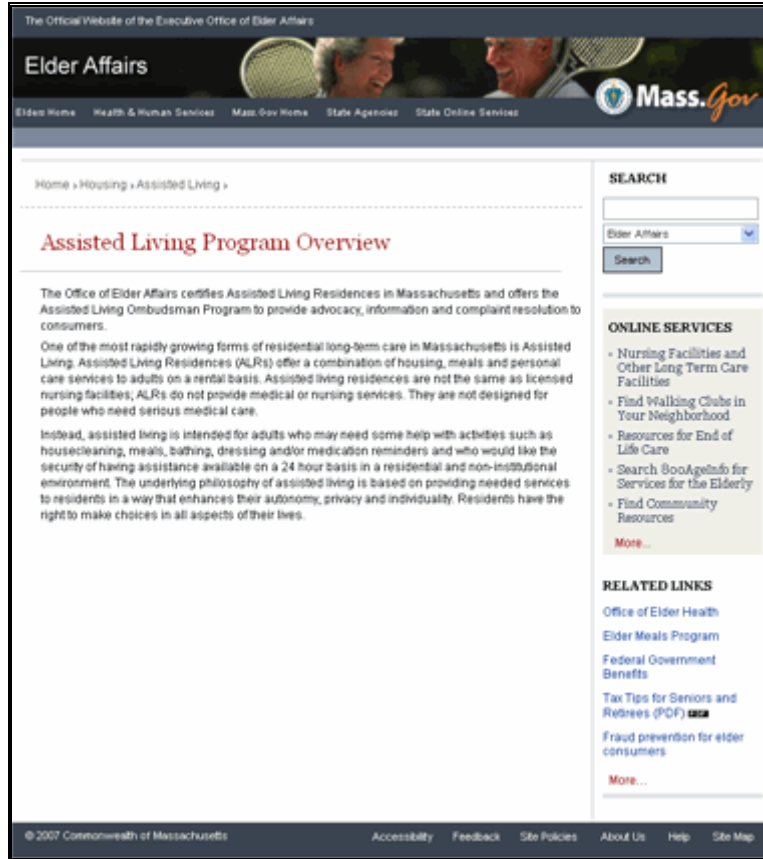
Figure 7. Topic Model Resource/Terminal Content

Component Descriptions for Topic Model Pages

Each page level can contain combinations of modules.

Table 5. Component Descriptions for Topic Model Pages

Component	Description
Header	Provides an easy way for users to navigate back to the home page. When Mass.Gov is displayed in the agency banner, users can click on the text to go to the Mass.Gov home page.
Banner	An image or set of images that allows the user to identify a new agency page when he or she navigates to different content. Agencies can choose either one constant image or six or more images that change when the page is refreshed.
Breadcrumb	Provides the user with a sense of place within the portal and an easy means of navigating selectively backward. It is based on user location within the structure of the website, rather than actual click sequence.
Welcome module	Displays an image of the Executive Office Secretary or agency head and links to his or her biography or message.
Our Organization module	Displays either a list of agencies (with landing pages) under the executive office or a breakdown of specific units within an agency.
Key Initiative/Key Resources modules	Displays links and/or phone numbers related to key projects/goals and resources to the executive office or agency.

Component	Description
Online Services module	Displays a list of links to transactional online state government services appropriate to the user's context.
Feature Story module	Used for a weekly story about subjects of general interest.
Home Center	Displays all topics assigned to the Executive Office or agency. Under each topic a maximum of four subtopics are displayed to give an indication of what is found under this topic. By clicking the topic label or more…, a full list of subtopics under that topic is displayed.
Subtopics (bubble-ups)	Short names of subtopics or resources that are chosen to be displayed under the topic.
Search module	Serves as an interface to Google's search capabilities for searching portal content. Users may choose to search within their own agency or in all of Mass.Gov.
News & Updates module	Displays headlines of recent news and updates along with links to the full stories.
Publications module	Displays content that could be distributed in print form.
Footer	Provides an easy way for users to link to portal utilities such as Site Policies, Contact Us, Help, and Site Map.
Quick Links module	Displays a list of links to transactional online state government services appropriate to the user's content.
Related Links module	Displays links to topics that enhance or relate to topics on this page. **Note:** For Resource/Terminal Content pages, these modules are inherited from the parent category.
Page Title	On a topic, subtopic, sub-subtopic page, the label given to the category in CMA. On a resource/terminal content page, the label given to the resource in CMA.
Terminal Content	The center content in a Resource/Terminal Content page, based on freeform text entered in the TeamSite template for content chunks.

2 TeamSite

Authors create and manage content using two distinct interfaces: TeamSite and CMA. TeamSite is used as a repository for XML files, images, and documents, while CMA is used to create the site structure and place links on pages and modules.

XML chunks make up the center area content of terminal content pages. Additionally, all sites have utility chunks, and static module chunks, and, optionally, press releases. These file types are described in "Additional TeamSite Content/Template Types" on page 25.

Getting Started with TeamSite

TeamSite Requirements and Settings

If you are not sure how to verify or install the following components or security restrictions prevent you from viewing or changing settings on your machine, please consult your desktop support staff for assistance.

Required Software

You will need the following two components installed on your workstation for TeamSite to operate correctly:

- **Microsoft Virtual Machine**
  The Microsoft® Virtual Machine, or Microsoft VM as it is commonly called, is available as an optional installation item on the Microsoft Windows XP Service Pack 2 CD. (Microsoft no longer offers the Microsoft VM as a download on its website, but if you are within MAGNet, you can download the Microsoft Virtual Machine.[1]

- **Sun Java Runtime Environment 1.4.2_10**
  You will need to first uninstall any newer versions of Java from your workstation and install the Sun Java J2SE JRE version 1.4.2_10.[2] This is the latest version of the Java JRE that is supported by Mass.Gov's version of TeamSite. Newer versions of Java, such as 1.5 or greater, are incompatible with TeamSite's import utility, so it is very important that you only use 1.4.2_10. You may receive a message that a newer version of Java exists. **Do not install it.** For instructions on disabling the automatic Java updates, please refer to Sun's Java Update Configuration page.[3]

Checking Your Settings

To check your settings:

1. In Microsoft Internet Explorer, from the Tools menu, choose Internet Options, and select the Advanced tab.
2. Scroll about half way down to sections that contain the Java (Sun) and Microsoft VM settings. Configure the settings as follows:
   - Use JRE 1.4.2_10 for <applet> (requires restart) – **unchecked**
   - JIT Compiler for virtual machine enabled (requires restart) – **checked**

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[1] http://dbqa.itd.state.ma.us/msjvm/msjavx86.exe

[2] http://javashoplm.sun.com/ECom/docs/Welcome.jsp?StoreId=22&PartDetailId=j2re-1.4.2_10-oth-JPR&SiteId=JSC&TransactionId=noreg

[3] http://www.java.com/en/download/help/java_update.xml
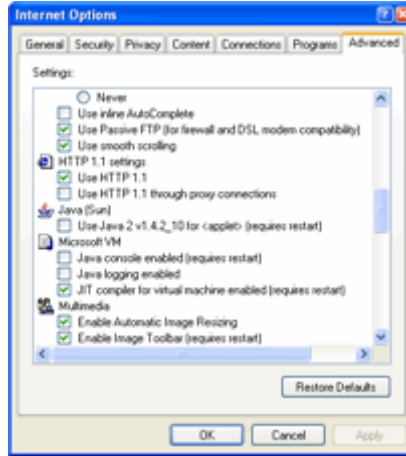
Figure 8. Internet Options, Advanced Tab

Initial Setup

Internet Explorer version 6.0 is the recommended is the recommended browser for accessing CMA. You can also use IE version 5.5, but you **cannot** use IE 7.0. If you are using Internet Explorer 6.0, you may need to add the server to your list of trusted sites.

To add the server to your list of trusted sites in Internet Explorer 6.0:

1. Open a browser.
2. Click Tools and click Internet Options.
3. Click the Security tab.
4. Click Sites.
5. Type https://work.mass.gov in the Add this Web site to the zone text box, and click Add.
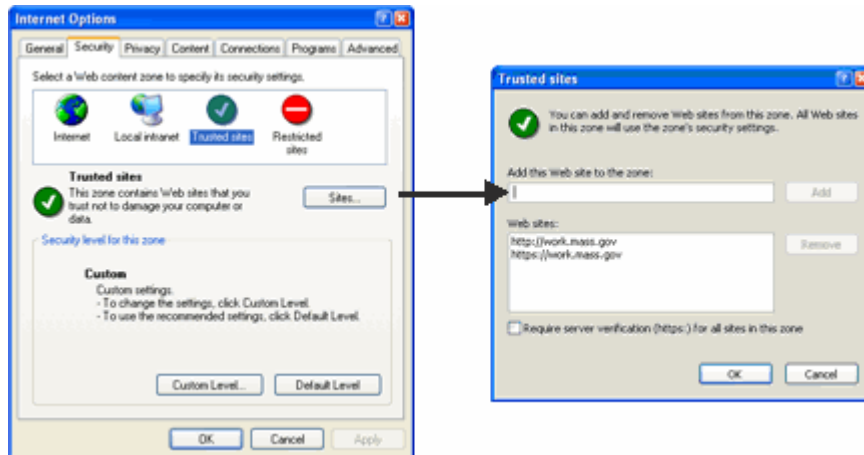
Figure 9. Internet Options, Security Tab

6. Be sure that Require server verification (https:) for all sites in this zone is unchecked.
7. Click Add, click OK.

Allowing Pop-Ups

TeamSite uses pop-up windows occasionally as part of its functionality, so you must enable pop-ups for work.mass.gov.

To enable pop-up windows for work.mass.gov in Internet Explorer 6.0 or higher:

1. From the Tools menu, select Pop-up Blocker and Pop-up Blocker Settings.
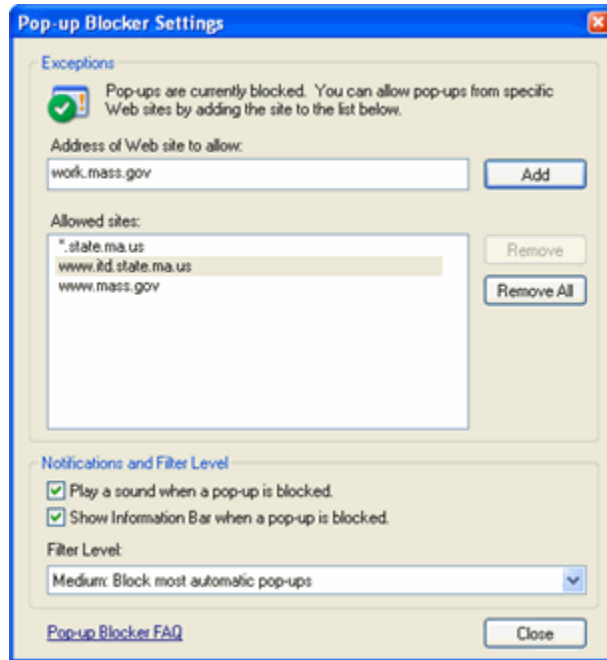
Figure 10. Pop-up Blocker Settings

2. In the Address of Web site to show text box, type work.mass.gov, and click Add.
3. Click Close.

TeamSite Access and Login

This section provides an overview of logging into and navigating through TeamSite.

To log in to TeamSite:

1. Open your Internet browser and type https://work.mass.gov/ into the address line. The TeamSite login screen is displayed.

Figure 11. TeamSite Login Screen

2. Enter your assigned username and password. These have been individually assigned to you and are managed by the Mass.Gov Office.
    Note: Usernames and passwords cannot be changed without assistance from the Mass.Gov Office.

3. Choose Standard and Author from the drop-down menus.
4. Click Login to launch TeamSite.
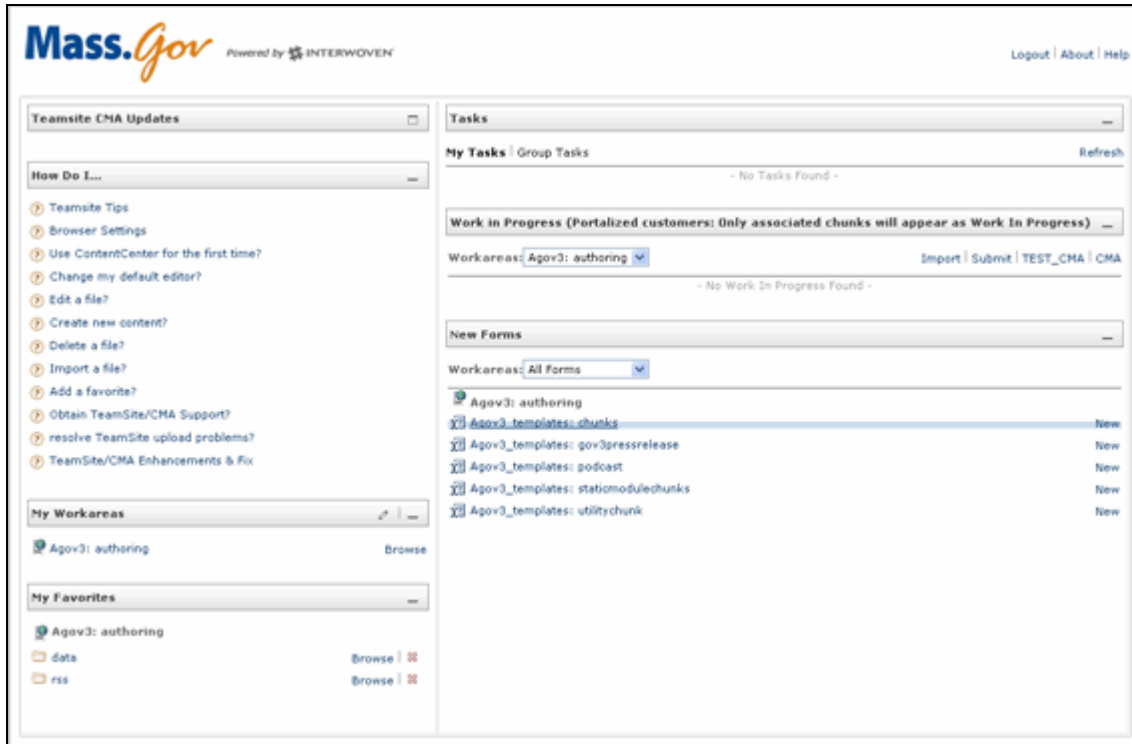
Figure 12. TeamSite Home Page

TeamSite Folder Structure
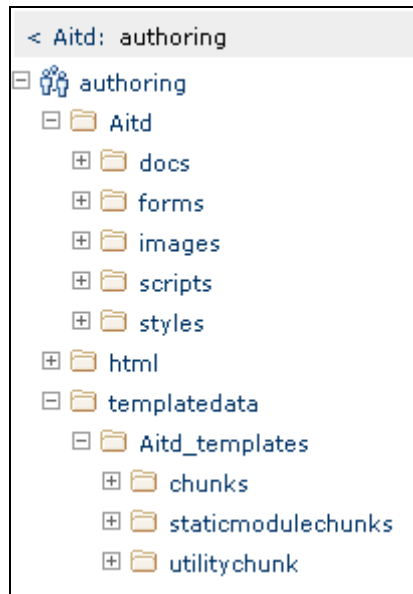
Figure 13. TeamSite Folder Structure

SiteName **Folder**

This branch holds subfolders for the following:

- **docs** – downloadable documents such as Word, PDF, Excel, or PowerPoint
- **images** – for navigation, or display within content chunks
- **other** – files used by Mass.Gov only, such as, scripts, style sheets, and XSL files

Importing documents and images, and submitting the files to production are described in "Importing Documents and Images into TeamSite" on page 16.

Templatedata **Folder**

This branch holds subfolders for the XML files and data entry templates used to display terminal content on your site. Click templatedata > *yoursitename_*templates to see which template types are available to you.

The majority of sites have the following subfolders:

- **chunks** – basic template for entering terminal content pieces.
- **pressrelease** – press release template for custom display of agency's press releases (not available on all sites).
- **staticmodulechunks** – basic template for creating and maintaining content for feature stories.
- **utilitychunk** – basic template for entering utility content, such as Site Policies, Help, Contact Us, Welcome.

Each template type folder typically has two subfolders:

- **data** – contains XML files – this is the only subfolder authors need to access.
- **presentation** – contains files related to the preview function. Only site administrators can access these files.

Importing Documents and Images into TeamSite

Any documents for download (PDF, Word, etc.) or images that are to be made accessible to the public through your site must be uploaded into the TeamSite docs or images folders respectively. (**Note:** You do not have to import images that are embedded in documents.) These files must then also be submitted to the production environment. Otherwise you will get a page or file not found error. The following sections cover importing documents and images into TeamSite and submitting those files into the production environment.

Importing Documents and Images (Method A)

To import documents or images into TeamSite (Word, PDF, XLS, PPT, JPG, GIF):

1. Click the Import link in the Work in Progress pane in your workarea.
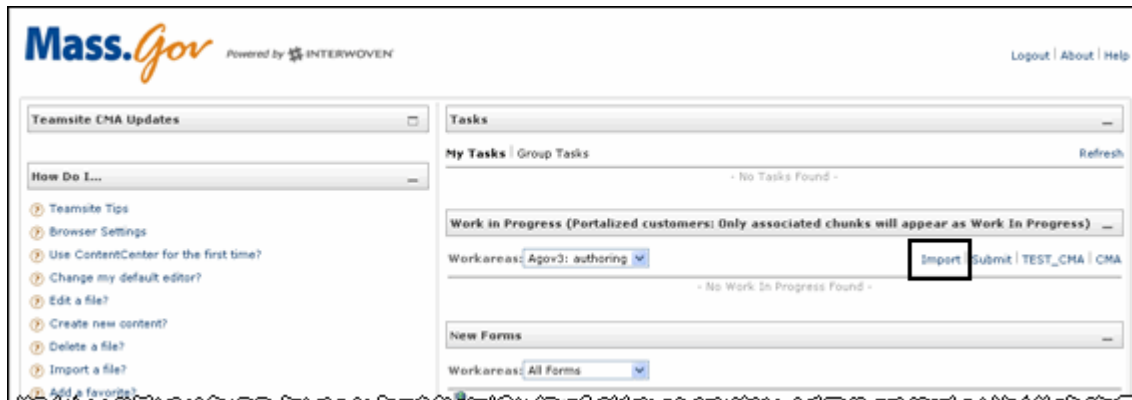
Figure 14. TeamSite Home Page, Import Button

When you click Import, you can access to all document files from your PC.

2. Navigate to the folder where the file you want to upload resides.
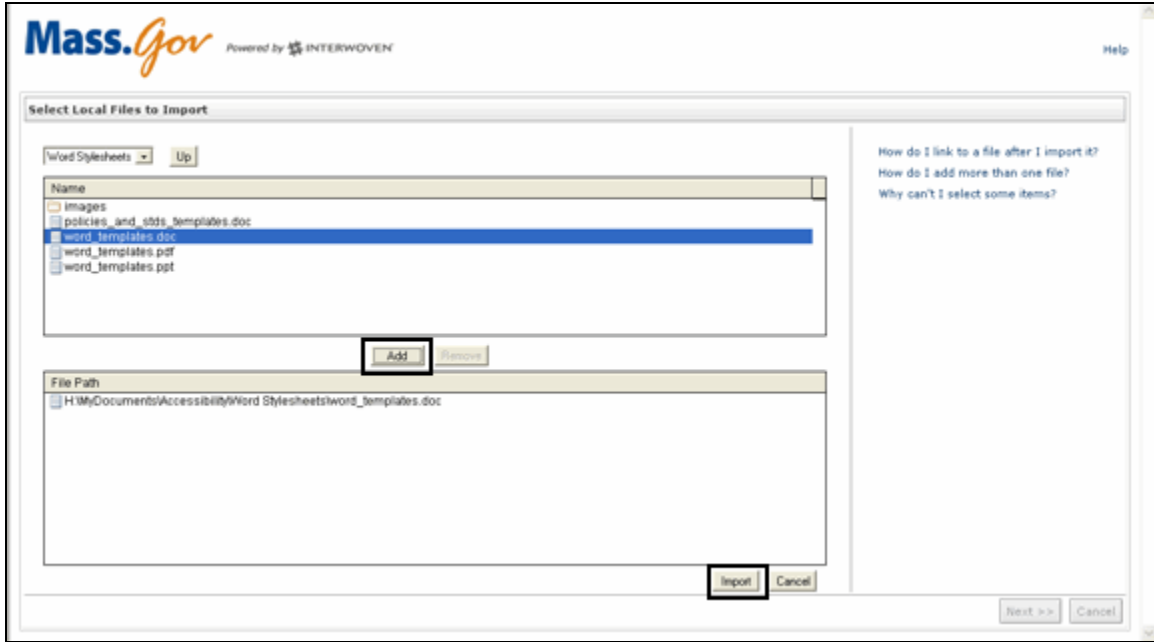
Figure 15. Select Local Files to Import

3. Select the desired file and click Add. You can select multiple files to add at one time.
4. Once you have selected all the files you want to import, click Import on the lower right.
5. When prompted where you would like the files to be stored, use the Browse link to navigate to the folder.

You can now submit your import or keep as a work in progress. Please see "Submitting During the Import Process" on page 18 for further detail.

Importing Documents and Images (Method B)

To import documents or images into TeamSite (Word, PDF, XLS, PPT, JPG, GIF):

1. Navigate to the folder where the file you want to upload resides. The two main folders for this purpose are docs (everything but images) and images. You do not have to import images that are embedded in documents.
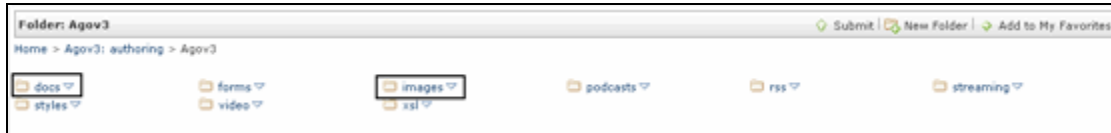
2. Select the Import Files link.

The Select Local Files to Import screen gives you access to document files currently available from your PC.
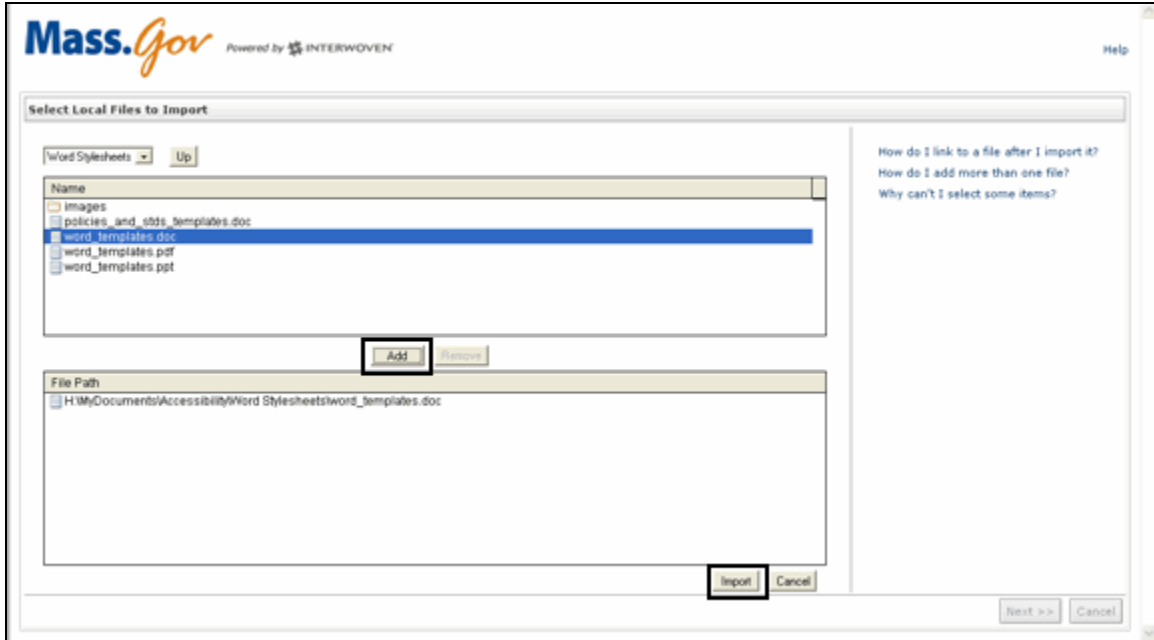
3. Select the desired file(s) and click Add. You can select multiple files to add at one time.
4. Once you have selected all the files you want to import, click Import on the lower right.
You can now submit your import or keep as a work in progress. Please see "Submitting During the Import Process" on page 18 for further detail.

Submitting Documents and Images to Production

There is one more (important!) step in making documents and images available on your website. The files must be moved to the production environment.

If you do **not** move the files to production using the process described below, they will not be viewable (images) or downloadable (documents) by your end users, even if you can see them on the preview site. The preview site only runs within the staging environment, not the production environment.

Submitting During the Import Process

Once you click Import, the following screen is displayed:
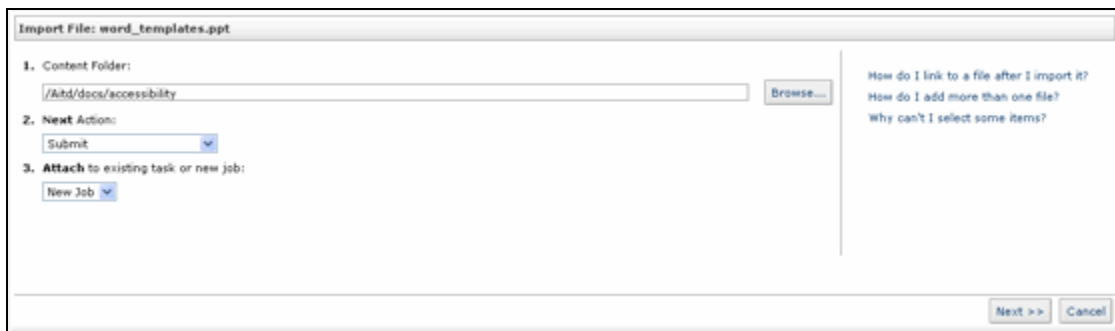
1. In Next Action drop-down menu, you can choose Submit or Keep as Work in Progress.
2. If you choose keep as a work in progress (if you need to come back to it), click Next, and return to Step 3 at a later time.
    –or–

    Choose Submit and click Next.

3. Select Submit to PRODUCTION (Press Releases, PDFs, DOCs, IMAGES, etc.)

Selecting this option deploys the files/press releases to production and staging simultaneously. No task is created.

4. Click Next.
5. Type the description and click Next.
6. Click Done.
   Your import has been submitted and is ready to be inserted into a chunk or associated to content on your website.

Creating and Editing TeamSite Content

This section provides procedure for creating, editing, and deleting content chunks. The section "TeamSite Visual Editor" on page 29 describes the Visual Editor toolbar and how to use the toolbar buttons to work with chunk content.

Creating Content Chunks

Before adding a new chunk page, consider the impact to the entire site as well as how you may be using the content in future. To help analyze the situation, ask yourself the following questions:

- Where will this content fit on the site?
- Is it likely to be re-used? Would it be re-used in part or in whole?
- Would it be better if broken down into multiple resource links with brief descriptions?
- Is there related content on the site already? Could it be combined with this new content?

To create a content chunk:

1. From TeamSite, select the appropriate Workarea (if necessary) in the New Forms area.
2. Click New to the right of the appropriate template in the New Forms area.

Figure 16. Mass.Gov Home Page, New Forms

The Edit Chunks screen opens and is blank.
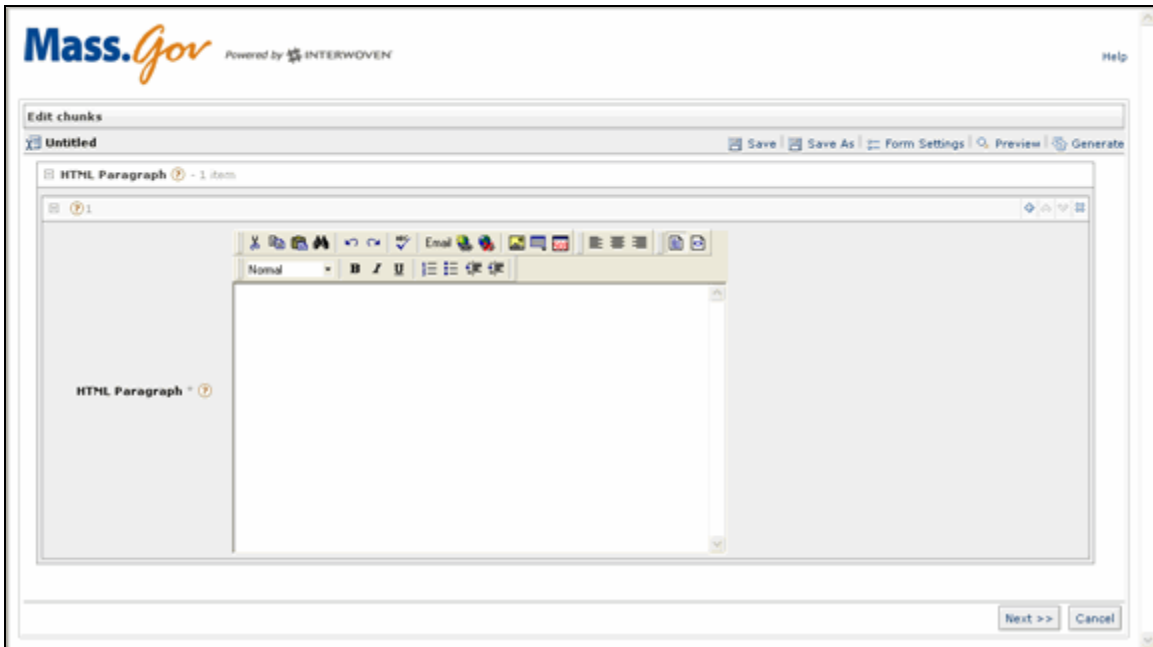
Figure 17. Visual Editor

3. Press the space bar or Enter key in response to the following message:
    Press SPACEBAR or ENTER to activate and use this control.

4. Enter and edit your content in the HTML Paragraph box. For information on the buttons in the Visual Editor toolbar,
    refer to "Overview of the Visual Editor Toolbar Buttons" on page 29.
    Note: If you are using TeamSite for the first time, you may need to download and install the Visual Editor as described
    in "Appendix A: Installing Visual Editor" on page 69.

5. To save the file, click Save or Save As on the upper left of the screen.
    A dialog box opens, defaulting to the correct folder for saving the file. <mark>Do not change the folder.</mark>

6. Choose a file name that describes the contents of the file. Do not include any spaces or special characters (ex. , & @ ! ? \
    /). **Important:** Enter the extension .xml, or the publishing process will not work.
    You may want to use a standard file naming convention to make content easier to locate. For example:

    -   If the content originated with a specific agency, you may want to begin filenames with the agency acronym (for
        example, dss_ or dph_).
    -   If content primarily belongs under a specific topic, you could begin the filename with an abbreviation of the topic
        (for example, cyf_ for Children, Youth and Families).
7. Click OK to save the file.
8. Continue as described in "Making Content Available in CMA" on page 22.

Opening and Editing Content Chunks

To make changes to a content chunk:

1. From TeamSite, in My Workareas (on the left), click Browse to the right of the appropriate workarea.
    Note: If you have specified a folder as a Favorite, you can click Browse for that folder in the My Favorites area (on the
    left).
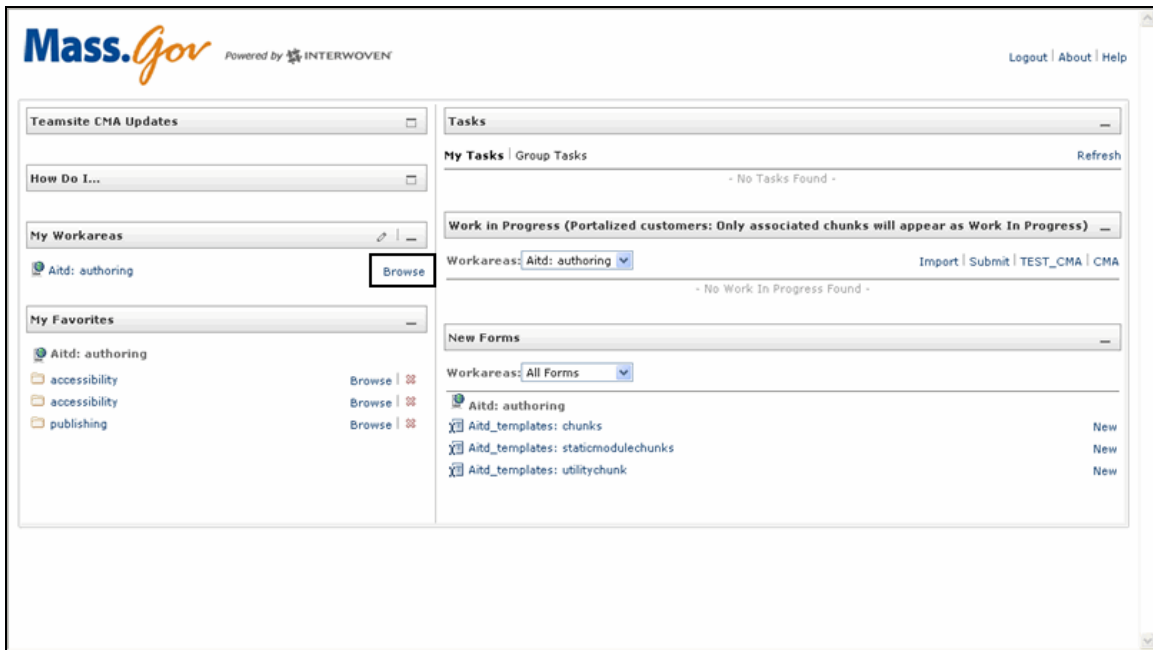
2. Navigate to the following folder:
    templatedata > *yoursitename*_templates > chunks > data

3. Click the Edit link to the right of the file you want to edit. The content is displayed in the HTML Paragraph section of
    the Edit Chunks screen.
4. Edit the file as described in the sections that follow.
5. Continue as described in "Making Content Available in CMA" on page 22.

Saving and Previewing Content in TeamSite

In order to facilitate the creation of content in TeamSite, special presentation templates were created for
previewing content. These templates place content from chunks or utility chunks into a mocked-up Mass.Gov
HTML page so that you may get an idea of how the page will look in production.

On Mass.Gov, a special preview template is also available for feature stories (within the staticmodulechunks folder).

Keep in mind that this is not the real page. All other modules on the page are completely static with no active hyperlinks or rollover effects. They are simply on the page to give an idea of context. Page widths and style sheet are consistent with those used on the actual website, so they present a realistic view of how your content will look when published.

To preview the page:

1. Save the file.
   You must save your file before you can preview it.

2. Click Preview.
   A new window opens to display the mock-up HTML page.
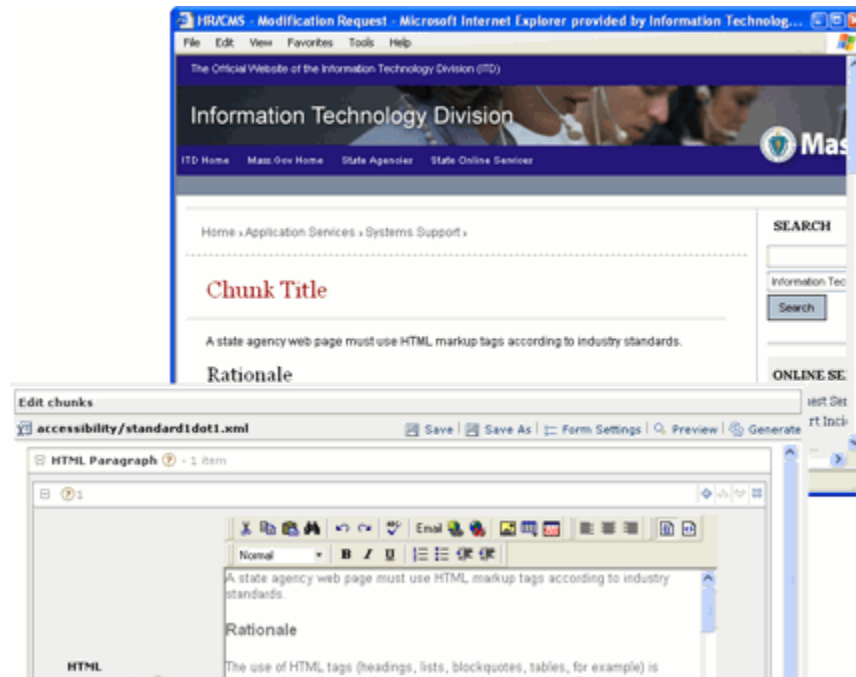
Figure 18. Document in Visual Editor and in Preview

Making Content Available in CMA

Working with New XML Chunks

A new chunk is a chunk that has **no** association or resource deployed to production. New chunks will be available automatically in CMA after you save and name them.

Do **not** use Submit for new chunks; you will get an error. Instead, from the Next Action pull-down menu, choose Keep as Work in Progress.

Working with XML Chunks with an Active Resource and Association

The workflow Submit action is for chunks that have an active resource and association.

To submit a chunk with an active resource/association to staging or to production:

1. After you have saved and previewed your changes, click Next.
2. Choose Submit from the pull-down menu and New Job, and then click Next.

3. From the Select a Workflow dialog box, select one of the first two options.

- **Submit and Generate to STAGING Only (CHUNKS – XML, Utility, and Static Module)**

Use this workflow option when you want keep the production version unchanged and store the revised chunk in staging only.

Selecting this option generates the chunk for viewing on the staging server while the original chunk remains deployed on the production server. The chunk and resource/association has a TeamSite Preview Lock applied. In order to clear the TeamSite Preview Lock:

- The task must be approved, putting the chunk into production.

  –or–

- The task must be rejected, rolling the staging version back to original.

- **Submit and Generate to PRODUCTION (CHUNKS – XML, Utility, and Static Module)**

Selecting this option deploys the chunk to production and staging simultaneously. No task is created. You can now use this function for active feature stories and static module chunks.

4. Click Next.
5. Enter a Workflow Description, and click Done.

Unlocking a File

Icons to the left of the filename in the Files list indicate if the file is locked: You cannot unlock files that have been locked by someone else unless you have site administrator privileges. Locking is used to prevent multiple authors from simultaneously editing the same file. You cannot open and edit a file that is locked by another user. Likewise, another author cannot open and edit a file that is locked by you.

To unlock a file that you have locked (so that another user can edit it):

1. Click File Actions.
2. Select Unlock from the drop-down menu.

Figure 19. File List with Locked File For information about locked files, refer to "Appendix C: TeamSite and CMA Locking and Error Messages" on page 71.

Creating a New Chunk Using Save As

To create a new chunk using Save As:

1. Locate and open a chunk in TeamSite, and click Edit.
2. Click Save As.
3. Refer to "Working with New XML Chunks" on page 22.

Creating a New Chunk Using Rename

To create a new chunk using Rename:

1. Locate a chunk in TeamSite, and choose Rename in the File Actions menu.
2. Assign the file a new name followed by the extension .xml.
3. Save and preview.
4. Click Next, and select Keep as Work in Progress from the pull-down menu.

Note: After you have renamed the chunk, it is available in CMA. The old chunk is deleted, and you must process the old chunk for deletion as described in "Deleting a Chunk" on page 25.

Creating a New Chunk Using Copy

To create a new chunk using Copy:

1. Locate a chunk in TeamSite, and choose Copy in the File Actions menu.
2. Assign the copy a new name followed by the extension .xml.
3. Save the file in the appropriate folder, and click Preview.
4. Click Next, and select Keep as Work in Progress from the pull-down menu.
The chunk will be available to you in CMA.

Deleting a Chunk

To delete a chunk:

1. Locate in TeamSite the chunk that you want to delete.
2. From the File Actions menu, choose Delete.
3. In the Delete a File dialog box, click Delete, Submit, and New Job, and then click Next.

4. In the Select a Workflow dialog box, choose Process non-associated files for deletion, and click Next.

5. Enter a workflow description, and click Done.

Additional TeamSite Content/Template Types

In addition to content chunks, several other template types are used across multiple sites. Follow the directions in "Creating Content Chunks" on page 19 to create a new file for each of these template types, substituting the desired template type for chunks as appropriate.

Utility Chunks

A utility chunk (template type = utilitychunk) is used for creating content that is accessed through footer utility links on each website, such as Contact Us, Help, or Site Policies. Utility chunks can also be used for creating content that does not otherwise fit into the normal structure of the website, such as the Welcome and Bio modules. This can also be the case with feature stories.

The data capture template for a utility chunk is the same as that of the content chunk.

Static Module Chunks

Static module chunks (template type = staticmodulechunk) share the same data capture template as chunks and utility chunks. However, they are used for the display of feature stories and are stored in a separate folder due to unique display requirements of CDA (Content Display Application).

Feature story files should follow a naming convention that clearly indicates what they are, so that they may be re-used as necessary.

Ozone

The ozone template type is used on Mass.Gov only. It is used to facilitate the display of a custom Epicentric module set up to capture air quality results. It should only be accessed by site administrators.

Press Releases

The press release template (template type = pressrelease) is mostly commonly used by the Governor's site. However, select executive offices may request that a custom press release template be created for display of their news releases.

To create a new press release:

1. In the New Forms section of the TeamSite home page, click New to the right of the pressrelease template. A blank press release form is displayed (see Figure 21).
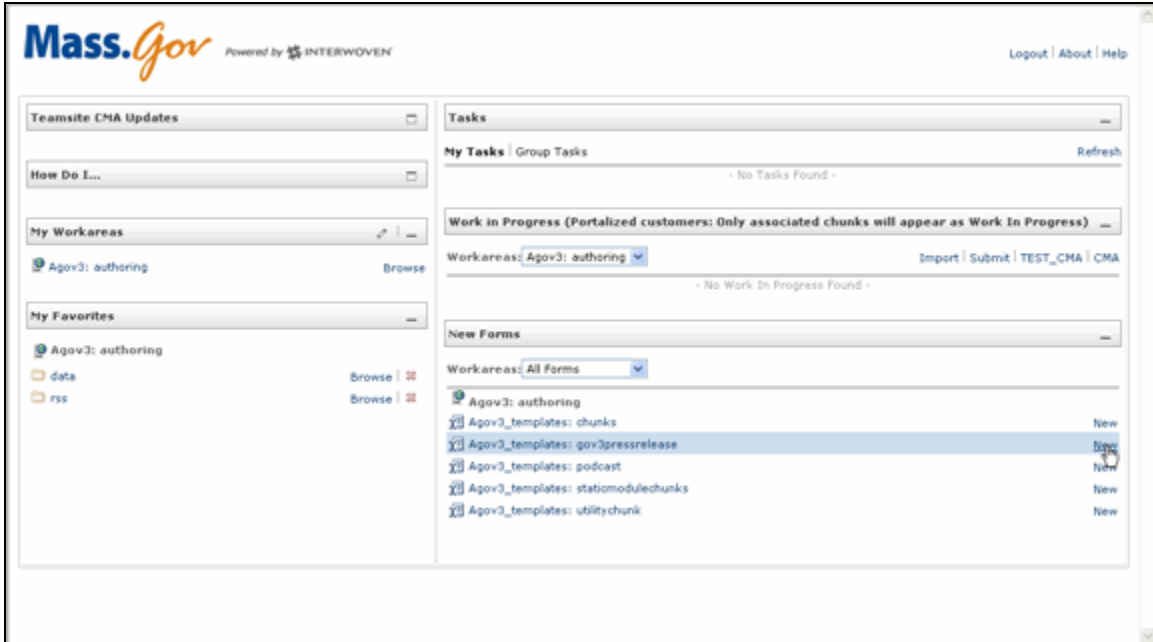
Figure 20. TeamSite Home Page, New Press Release

2. If you are copying the press release from a Word doc, open the document and, to the extent possible, clean up the text (remove manually inserted page breaks/numbering, tabs, etc.)
3. Copy the heading and subheading from the Word version of the press release into the appropriate fields and select the correct date from the drop-down menus.

4. Copy and paste the contact information from the Word doc. If there were any tabs surrounding the text, these will have been translated to spaces in HTML, so you may need to do some clean-up. Make sure the text is single-spaced (achieved by hitting Shift+Enter).
    See "Using the Visual Editor" on page 30 for tips on using the Visual Editor.

5. Copy and paste the text of the press release from the Word doc into the HTML Content text box, and perform any clean-up editing necessary. (You may need to remove extra returns between paragraphs, re-indent text, etc.)

6. Click the Save button on the upper left and assign the file a name following the standard naming convention for press releases:

    • pr_yymmdd_descriptivename.xml; that is, pr_ (press release), followed by the year, month and day abbreviated, then a brief, descriptive name, and finally, .xml.

    • Do not include any spaces or special characters (ex. , & @ ! ? \ /) in the name of a file.

Figure 21. Edit Press Release

Simple Forms Processing in TeamSite

You can create an interactive form in TeamSite that allows you to use an HTML form to send email to specific addresses. The process involves creating two files.

• An HTML page with a form for the user to fill out.

- An email template file (also known as an ASCII text file) that will define where the email, which the form creates, will be sent and how the data from the form will be formatted.

To create an interactive form in TeamSite:

1. Design your form.
2. Create a file, which is an HTML version of the form.
3. Create an email template file.
    See Simple Forms Processing[1] for technical instructions on building the html and text files. An example of "hidden input" is <input type="hidden" name="file" value="/Agov2/forms/questions3.txt">.

4. Upload the text file to the Forms folder in your TeamSite workarea.
5. Open a new chunk in TeamSite. Copy and paste the code for the HTML form (not the header, etc. just the HTML for the form itself) into the new chunk. Use the HTML view, not the WYSIWYG view.
6. Save and close the chunk. Submit the chunk and the text file in the Forms folder to production.
7. In CMA, associate the chunk to the appropriate category, generate the content, preview and approve the task.

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[1] http://mass.gov/itd > Application Services › Portal Products & Services › HTML Publishing: Standards and Tools › Simple Forms Processing

3   TeamSite Visual Editor

Overview of the Visual Editor Toolbar Buttons
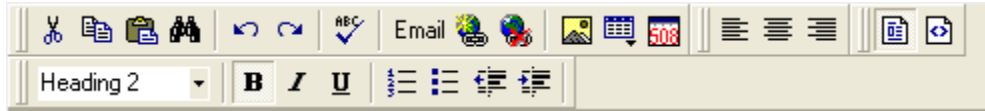
Figure 22. Visual Editor Toolbar

Table 6 lists each Visual Editor toolbar button with the keyboard shortcut, if available, and the function of the button. Details about using these buttons are provided in the sections that follow.

Table 6. Visual Editor Toolbar Buttons

Button		Shortcut	Function
Cut	✂	Ctrl+X	Remove selected text and graphics. Place that data into temporary memory, also known as the clipboard.
Copy	📋	Ctrl+C	Copy selected text and graphics onto the clipboard. Leave the selected data where it is.
Paste	📋	Ctrl+V	Insert the most recently cut or copied text and graphics at the current cursor location.
Find	🔍	Ctrl+F	Search for text within the HTML paragraph window.
Undo	↰	Ctrl+Z	Reverse the most recent action, as if it had never occurred.
Redo	↱	Ctrl+Y	Reverse the undo action.
Spelling Checker	✓		Run the spelling checker.
Email Link	Email		Insert an email link. A secondary pop-up box asks you for the email address.
Insert Hyperlink	🌐		Insert a hyperlink. A secondary pop-up box asks you for the link name (browse able) and the window preference.
Remove Hyperlink	🌐		Remove a hyperlink from a text selection.
Insert Picture	🖼		Insert a picture from your workarea.
Table	📅		Insert or edit a table.
508 Table	508		Make table Section 508 compliant (accessible) with column and row headings.
View as WYSIWYG	📄		Display the content on the page as WYSIWYG (What You See Is What You Get).
View as HTML	◇		Display the content on the page as HTML.
Bold	**B**	Ctrl+B	Make the text bold.
Italic	*I*	Ctrl+I	Make the text italic.

Button		Shortcut	Function
Underline	**U**	Ctrl+U	Make the text underlined. It is recommended that you do not use underline to avoid confusion with hyperlinks.
Numbered item			Begin the line on which the cursor is located (or all selected lines) with a number.
Bulleted item			Begin the line on which the cursor is located (or all selected lines) with a bullet.
Indent			Increase or decrease the current line's distance from the left margin.
Justify Left, Center, Right			Align text: • Evenly on the left side (uneven on the right). • In the center of each line. • Evenly on the right side (uneven on the left).

Using the Visual Editor

Visual Editor is a basic visual HTML editor. The HTML Paragraph window contains the actual content that makes up the center area of each terminal content page.

This section explains how to use the tool for creating and editing content. For more information on writing for the web, please refer to the Mass.Gov Editorial Style Guidelines.

You can type directly into the HTML Paragraph window or paste text from an existing Word document. While Visual Editor provides an interface and functionality similar to Word, the product does have certain differences, requiring that you preview all content before deploying it to production.

See "Overview of the Visual Editor Toolbar Buttons" on page 29 for an overview of toolbar buttons, their keyboard shortcuts and function.
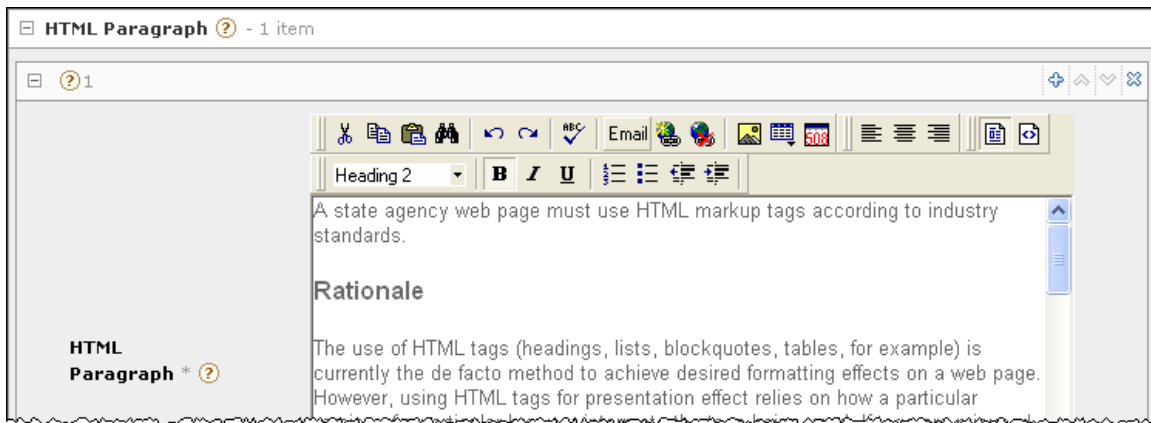
Figure 23. Visual Editor with Content

Enter vs. Shift+Enter

Enter and Shift+Enter have different effects on the formatting and display of text:

• Pressing Enter closes the paragraph and inserts a double line space before the start of a new paragraph. Each time you use the Enter key, you create a new paragraph and, therefore, a new formatting block. All formatting, such as heading or alignment (left, right, or center), is applied to the entire paragraph (formatting block).
• Pressing Shift+Enter places a single-space line break in your text, but does not start a new paragraph or formatting block. Any heading or alignment applied to the line above will also apply to the new line.

Carefully review line spacing and formatting before submitting any edited files to production to ensure the correct display of text.

Formatting such as bold or italics can be applied on a word-by-word basis and will not be affected by the use of Enter or Shift+Enter.

Fonts and Special Characters

The look and feel of the new portal is largely controlled by a style sheet and handled by the Content Display Application (CDA). The style sheet applied to all text on the site controls the color, size, and font for each module.

Sometimes when importing text with apostrophes, quotes, or accent marks, they will not render properly in the browser. To resolve this you must enter the character's numeric entity in the HTML code view:

- " " Quotation mark
- ' ' Apostrophe
- @ @ Commercial at
- © © Copyright
- ® ® Registered trademark

For a more compete list of these character entities refer to the resources below:

- MSDN HTML Character Sets[1]
- HTML Character Entities[2]
- HTML 4.01 Entities Reference[3]

Pasting Text from Word and Other File Formats

Authors should take special care when pasting text from Microsoft Word. Because Word and the Visual Editor use slightly different formatting, pasting directly from Word can result in formatting irregularities. The majority of these will be removed by the Clean HTML function.

- Before pasting anything from a Word document, it is a good idea to format text as Arial 10 point.
- Once text is in Visual Editor, you can reformat it using the toolbar buttons and drop-down menus:
    - Use bold and italics to emphasize text.
    - Underline should not be used, as underlined text is often confused with hyperlinks.

Cleaning HTML

If you decide to paste text directly from Microsoft Word into the Visual Editor, it is highly recommended that you first remove any special formatting, such as italics, font colors, or background shading before copying and pasting.

Often when pasting text directly from Word, you will be prompted to Clean HTML now.
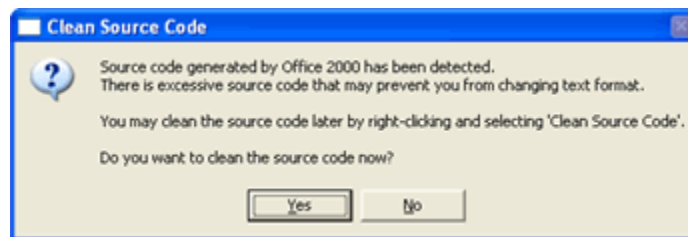
Figure 24. Clean Source Code Message

If prompted, click Yes. If not prompted, it is a best practice to right-click the text, and select Clean HTML. The Clean HTML function also runs each time the file is closed.

Cleaning will remove the majority of unwanted Word tags from the HTML, which are typically Microsoft specific, including certain styles and parameters unnecessary for general HTML display. Cleaning also removes font tags

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[1] http://msdn2.microsoft.com/en-us/library/Aa752011.aspx

[2] http://www.intuitive.com/coolweb/entities.html

[3] http://www.w3schools.com/tags/ref_entities.asp

and a majority of special characters, such as smart-quotes. If you find that font tags were not removed, you may need to go to the HTML view to manually remove them.

Applying Headings to Text

To provide your content with structure and accessibility, you must use headings in your document. Headings are controlled by the style sheet.

Heading styles assigned by Mass.Gov are as follows:

- Heading 2 <h2> - Georgia, 15 px
- Heading 3 <h3> - Georgia, 12.5 px
- Heading 4 <h4> - Georgia, 10.5 px, bold
- Heading 5 <h5> - Arial, 10.5 px, bold
Heading 1 is reserved for page titles.

Note: The style sheet applied to the Constituent Model and Topic Model portal sites is not the same as that applied to the Visual Editor. Therefore, text will look different in the Visual Editor window than it does in Preview mode and in the production site.

To apply a heading style:

1. Highlight or click in the paragraph you want to format.
2. Select the appropriate heading from the drop-down menu.
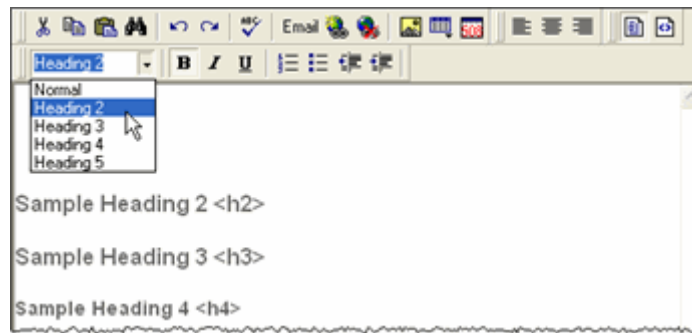
Figure 25. Visual Editor Heading Styles

Notes:

- If any of the text before or after your selection is also changed to the heading format, make sure there are hard returns (Enter) both before and after the selection.
- If you have pressed Shift+Enter, which inserts a line break, text on the new line will continue to be within the same formatting block and to have the same heading format as applied to the text directly above it.
- If you find that you are unable to reformat certain text, it may be that heading or style tags from Word were maintained after pasting the text from Word into Visual Editor. If this is the case, you can remove style tags by highlighting the text, and choosing Normal from the Style drop-down menu on the toolbar.

Aligning Text

To apply special alignment to a section of text:

1. In the Visual Editor window, highlight or click in the text you want to align.
2. Click the appropriate toolbar button to left-, right-, or center-align the text.

Notes:

- If any of the text around your selection is also changed to this alignment format, make sure there are hard returns (Enter) both before and after the selection.

- If you have pressed Shift+Enter, which inserts a line break, text on the new line will continue to have the same alignment as the text above until you press Enter and re-align the new paragraph.

Creating a Bulleted or Numbered List

Entering Lists Directly

You can type lists directly into Visual Editor in one of two ways:

1. Type each list item, hitting Enter at the end of each line. (These items will appear double-spaced until bulleted/numbered.)
2. When you have entered all items, highlight all text in the list, from the first to the last item.
3. Click either the Bullet or Number icon on the toolbar. (The list items will now appear as a single-spaced bulleted/numbered list.)

–or–

1. Press Enter at the end of your final paragraph before the list, and then click the Bullet or Number icon on the toolbar. A bullet or number is entered for the first item on the list.

2. Type that item and press Enter to add another item to the list.
3. When you are finished, hit Enter twice, or press Enter and then Backspace to return to normal text.
Note: Using Shift+Enter in a list will add a new line to the current list item, but will not add a new list item (new bullet or number). To leave a blank line between items in a list, press Shift+Enter twice. This will appear as two blank lines in the editor, but as only one on the live site.

Copying Lists from Word

The Visual Editor usually retains bulleted or numbered lists pasted in from Microsoft Word and converts them to the Visual Editor standard:

- Solid round bullets for level 1.
- Circle (hollow) bullets for level 2.
Note that the Visual Editor standard described above is not what you see in preview and production. In these places, the Mass.Gov style sheet determines bullet display. However, it is important that no special bullet formatting be present in the Visual Editor.

If you paste a list from Word that has square or some other form of bullets:

1. Highlight the entire list.
2. Click the bullet toolbar button twice to un-bullet the list and re-bullet the list with the standard bullets.
Note: When pasting a list from Word into the Visual Editor, the bullets are not always preserved. Always verify that your list is formatted correctly.

Creating Hyperlinks

Creating an Email Link

To create an email link:

1. Select the text you want to make into an email link.
2. Click the Email link button.

3. Type the desired email address and click Link.

Creating a Hyperlink to an Internal or External Web Page

To create a hyperlink:

1. Select the text you want to format as a hyperlink.
2. Click the Hyperlink button.

3. Open a new web browser and go to the page you would like to link to. (Do not use the Browse button on the Add Hyperlink dialog box. This is only used for linking to documents.)
4. Copy its URL and paste that into the hyperlink dialog box. (See note below about URLs.)
5. Select same window. **Note:** According to the Mass.Gov standard, all links should open in the same window.
6. Click Link.

Internal URL: A portal page is any web page with an address beginning with http://www.mass.gov/?page..., including all pages on your portalized site, as well as other portalized agencies, and Mass.Gov.

*   Portal page URLs: use an abbreviated URL, starting from "/portal/index.jsp" to the end of the URL.

External URL: External websites are all sites outside the portal, including non-portalized agency sites.

*   External page URLs: use the entire URL, including the http://.
*   Use this method to link to PDFs or other downloads on external sites.

Linking to Files for Download from your Site

A file must reside in your TeamSite workarea in order for you to link to it. Refer to "Importing Documents and Images into TeamSite" on page 16 for information on uploading documents.

To link to a downloaded document on your own site:

1. Select the text you want to make into a link.
2. Click the Hyperlink button.
3. Click the Browse button in the dialog box and browse through:
    yoursitename > docs >

4. Select a document.
5. Select same window, and click Link.
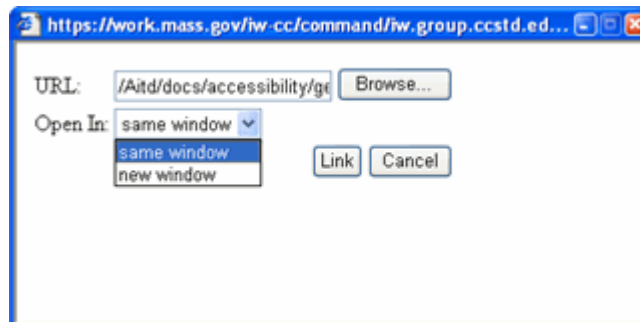
Removing a Hyperlink

To remove a hyperlink:

1. Select the hyperlink text.
2. Click the Remove Hyperlink button.

Important: Do not simply delete the hyperlink text using the Backspace or Delete key. Doing so may leave the hyperlink HTML code in the document and affect the accessibility of the page.

Working with Tables

Creating a Table

To create a table:

1. Place the cursor where you want the table to begin and click the Table button.

2. Click Insert Table from the menu. The Insert Table dialog box is displayed.
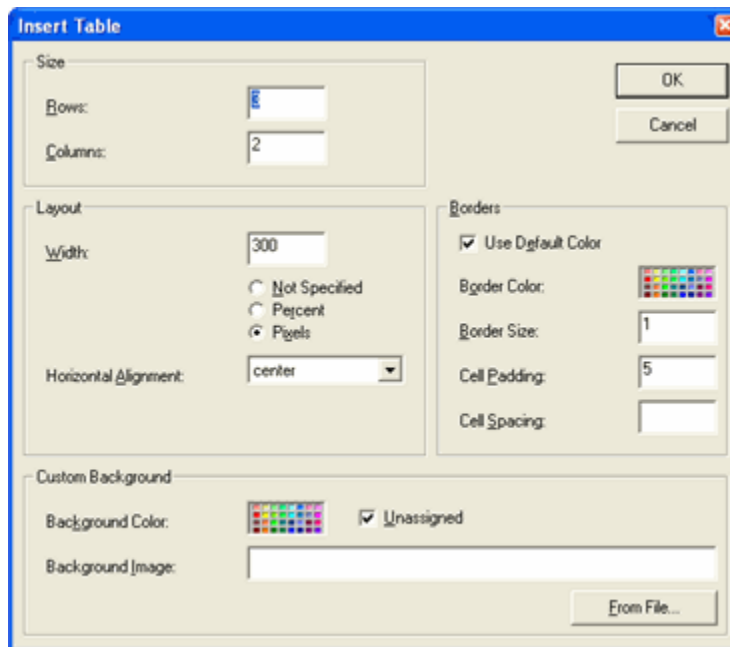
Figure 26. Insert Table Dialog Box

3. Choose the table attributes:
   Size:

   - Rows, Columns – Specifies the number of rows and columns in the table. After you create a table, you add new rows and columns by right-clicking in a cell and choosing.Table and Insert Row or Insert Column.
   Layout:

   - Width – Specifies a fixed table width either in pixels (max. 550), or in percentage of the center area of a given page. It is best to use a percent, as this adjusts to match the user's screen.
   - Horizontal Alignment – Table alignment across the web page (left, right or center)
   Borders:

   - Use Default Color – Assigns the default color (gray) to table borders
   - Border Color – Allows you to assign a color other than the default to your table borders
   - Border Size – Designates the size of the table border in pixels. A border of size 0 will be visible in Visual Editor for editing purposes, but will have no visible border to the end user.
   - Cell Padding – The space (in pixels) between the cell text and a cell's border

- Cell Spacing – The space (in pixels) between a cell and surrounding cells
Custom Background:

Background Color and Background Image can also be specified for a table. For the sake of accessibility, readability, and consistency with the portal, it is best to limit the use of colors and images.

4. Click OK.

Note: You can adjust table properties by right-clicking an existing table and selecting Table followed by Table Properties.

Deleting a Table

To delete a table:

1. Move the cursor over the table until the cursor changes to a cross-hair with arrowheads.
2. Left-click one time. The table becomes selected (small squares appear around it).
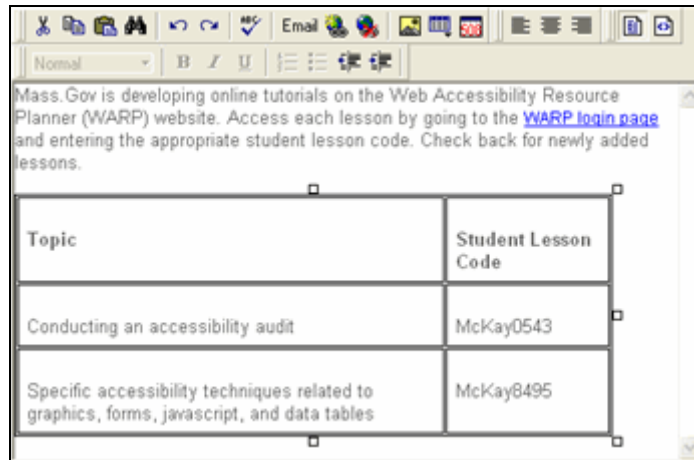
3. Press Delete.

Editing Cell Properties

To edit cell properties:

1. Click in the cell you would like to format.
2. Right-click and select Table and Cell Properties.
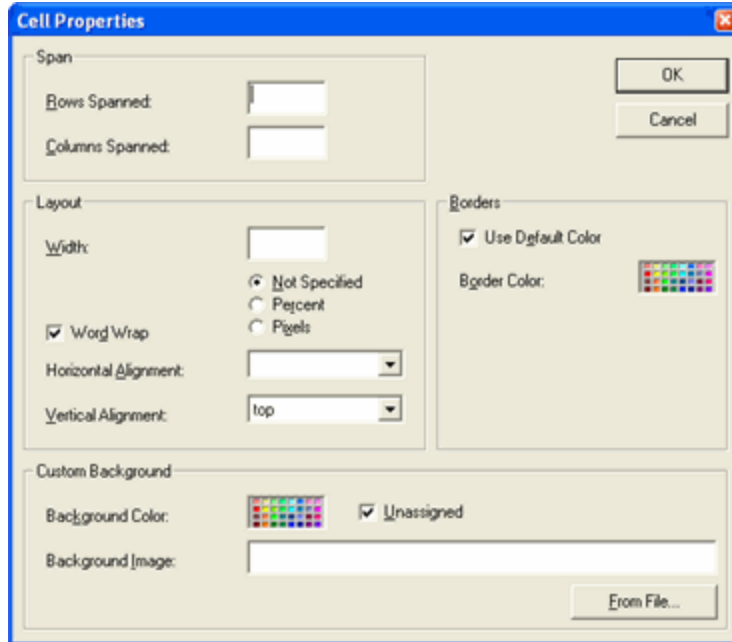
Figure 27. Table Cell Properties Dialog Box

3. Choose the cell attributes:
   Span:

   - Rows Spanned – Span multiple rows with a single cell, much like merging cells vertically
   - Columns Spanned – Span two or more columns with a single cell – much like merging cells horizontally
   Layout:

   - Width – Width of cells in this column in pixels or as a percentage of the table width
   - Word Wrap – (Default is checked) Determines whether text automatically moves down to the next line if it reaches the specified width of a cell
   - Horizontal Alignment – Alignment of data (left, center, right, justify) across a cell
   - Vertical Alignment – Alignment of data (top, middle, bottom, baseline) up and down within a cell
   Borders:

   - Use Default Color – Assigns the default table border color (gray) to this cell border
   - Border Color – Allows you to assign a color other than the default to cell borders
   Note: Use colors sparingly and always adhere to the Web Accessibility Standards.

   Custom Background:

   Background Color and Background Image can also be specified for a table. For readability and consistency with the portal, it is best to limit the use of colors and images.

4. Click OK.

When to Paste Tables from Word

If you are creating a simple table, it is best to create the table directly in the Visual Editor. However, there are some situations in which you will want to first create the table and apply formatting in Word and then paste it into the Visual Editor.

Some situations in which you may want to paste the table from Word include:

- The table is large (has several rows/columns).
- The table requires complex formatting (for example, varying font formatting styles by row or column or merged cells).
- You are unsure of the final number of rows and columns when you start entering data.

- The table already exists in a Word Document.
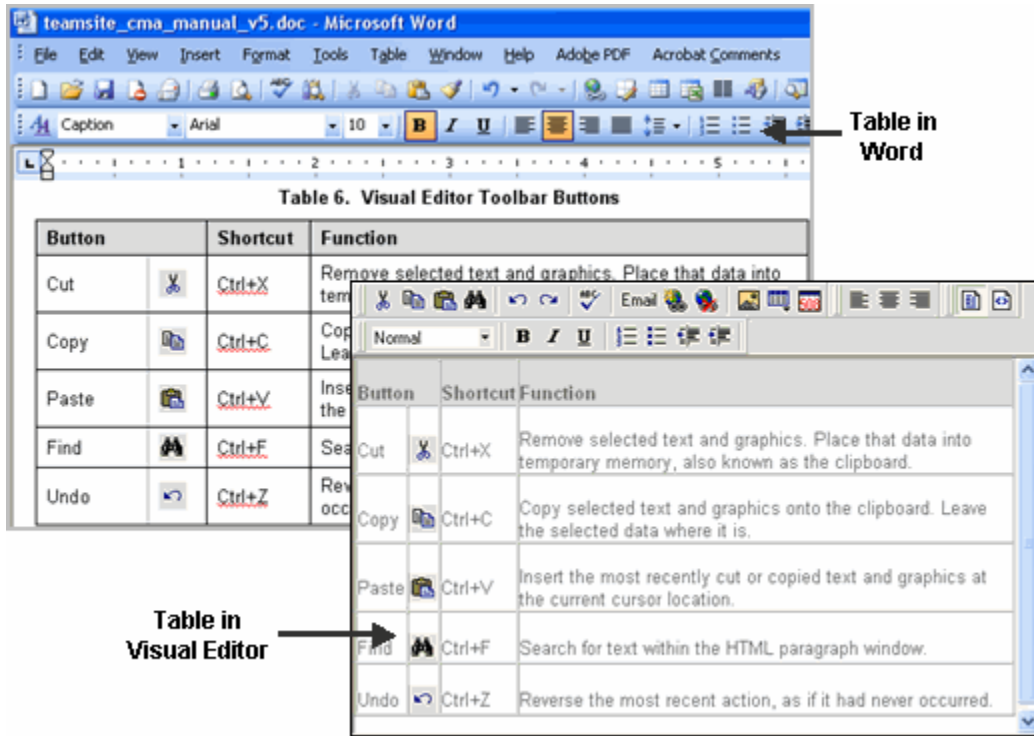
Figure 28. Copying a Table from Word to the Visual Editor

Copying and Pasting a Table from Word

To copy a table from Word and paste it into the Visual Editor:

1. Before copying the table from Word, remove any unnecessary formatting, such as font colors or background colors.
2. Select the table and copy it.
3. Place the cursor where you want the table to appear in the Visual Editor window and paste.
   Font formatting will be preserved on a cell-by-cell basis when pasted from Word into the Visual Editor, as will simple cell background colors.

   You may still need to make some formatting adjustments. In the example above, note the table's width has been adjusted to fit the editor window (if you choose to specify, the table width should not exceed 550 pixels or 100%).

4. After pasting the table into Visual Editor, select it, right-click, and choose Table followed by Table Properties or Cell Properties to do any additional formatting.

Making Tables Accessible (Section 508 Compliant)

To add HTML code to a data table to make it accessible to assistive technology:

1. Hover the cursor over a line in the table until the cursor becomes a cross hair with arrow heads. White squares at the top and bottom of the table indicate that the table is selected.
2. Click the Section 508 Table icon.

3. Specify the Section 508 table properties as described next.
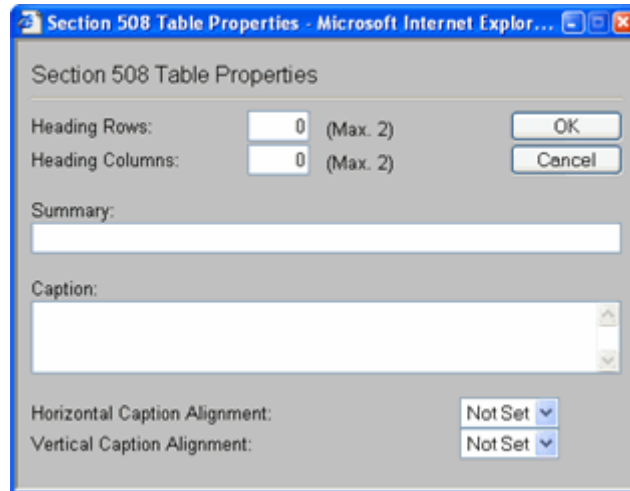
Figure 29. Section 508 Table Properties Dialog Box

The 508 Table Properties feature allows you to add the following improvements to your tables that will improve accessibility:

- The Heading Rows and Heading Columns attributes in the 508 Table Properties dialog box associate row and column heading information with each cell.
- The Caption element provides a short description of a table, much like an image caption. By default, most browsers display the element centered above the table. Do not use.
- The Summary attribute makes it easier for someone using a screen reader to understand the layout and content of a table. The summary will not be displayed in visual browsers, so you should make this information long enough so that someone hearing it will know whether they want to review the table in more detail.

In the Section 508 Table Properties dialog box, enter the following information, if applicable:

- Heading Rows – The number of rows that are in the heading, typically 1.
- Heading Columns – The number of columns that are in the heading, typically 0.
- Summary – Text that helps assistive technology users to understand the table.
- Caption – Table title – Do not use.
- Horizontal and Vertical Caption Alignment – Do not use.

Adding an Image to a Content Chunk

To add an image to your chunk, the image must exist in TeamSite. See "Importing Documents and Images into TeamSite" on page 16 for guidance on uploading images. The display width of a typical terminal content or utility page is 500 pixels, so ensure images are no wider than this. Should an image require resizing or formatting, you must resize it in a graphic tool such as SnagIt, Adobe Photoshop, or Paint.

To add an image to your text:

1. Place the cursor where you want the image to appear, and click the Insert Picture button from the toolbar.

   The Picture Properties dialog box is displayed.

2. Click Select New File on the Picture Properties dialog box and browse through:
   yoursitename > images

3. Select the image you would like to insert.
4. Click Preview to populate the width and height fields.
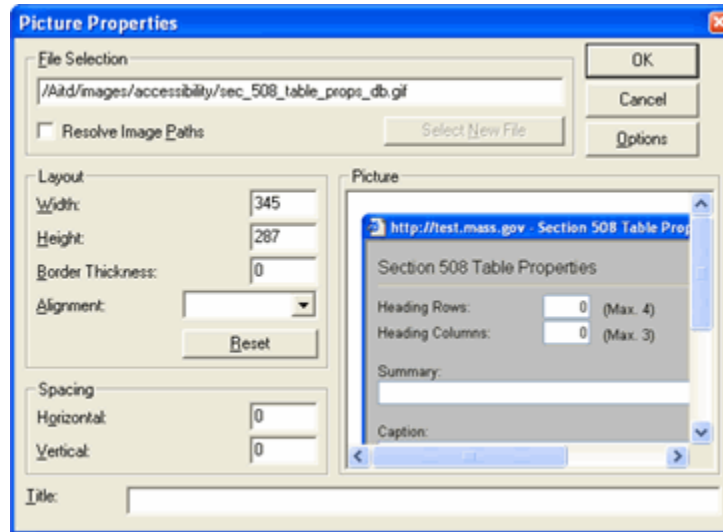
5. Set image attributes as desired:
    Layout:

    - Width and Height – The size of your image. Do not alter the values that were displayed when you clicked Preview.
    - Border Thickness – Specifies the width of a black border (in pixels) to be displayed around you image. Typically, you leave this set to 0.
    - Alignment – Specifies how the image will be aligned within the page or table cell. Use Right or Left to align the image beside the text.

    Spacing specifies the white space to above and below (Horizontal) or to the left and right (Vertical) between the image and any neighboring text or images. When you align an image to the left or right of text, use a Horizontal value to provide spacing between the image and the text.

    Title specifies the alternative text (alt-text), the information that the user will see if images are turned off or will hear if using a screen reader. This field is required by the Web Accessibility Standards.

6. Click OK. A placeholder for your image will appear in the Visual Editor window.
Note: To change the image attributes at a later time, right-click the image and select Picture.

If you find that picture placement on your page is difficult to maneuver, try placing the picture within a table. You can resize the columns to align the picture accordingly, and add text to the neighboring cells. Be sure that your image is sized properly to fit within the table cell to avoid distortion.

4 CMA

The Content Management Application (CMA) is a web-based tool for adding and editing content, managing navigation categories (constituents, topics, etc.) and mapping content to pages and modules. CMA interfaces with the Oracle database and Interwoven TeamSite XML repository. Additions, changes, and deletions are for display via the Content Display Application (CDA) on the Mass.Gov portal and portalized sites.

CMA is a series of web-based screens authors use to manage the display of content on their website. The application has built-in locking and error-checking to ensure data integrity and facilitate content publication. See "Appendix C: TeamSite and CMA Locking and Error Messages" on page 71 for more details on locking and error checking. The application is accessed from the author's TeamSite workarea.

Getting Started with CMA

All database related actions are managed through CMA. This includes creating, editing, and associating both categories (constituents, topics and subtopics) and resources (links, XML files, documents, minichunks). It also includes prioritization of items on a module and page, as well as managing the master agency list (Mass.Gov only).

Accessing CMA

You access CMA by clicking CMA in the TeamSite Work in Progress area. **Note:** You must be in your own workarea to access CMA.
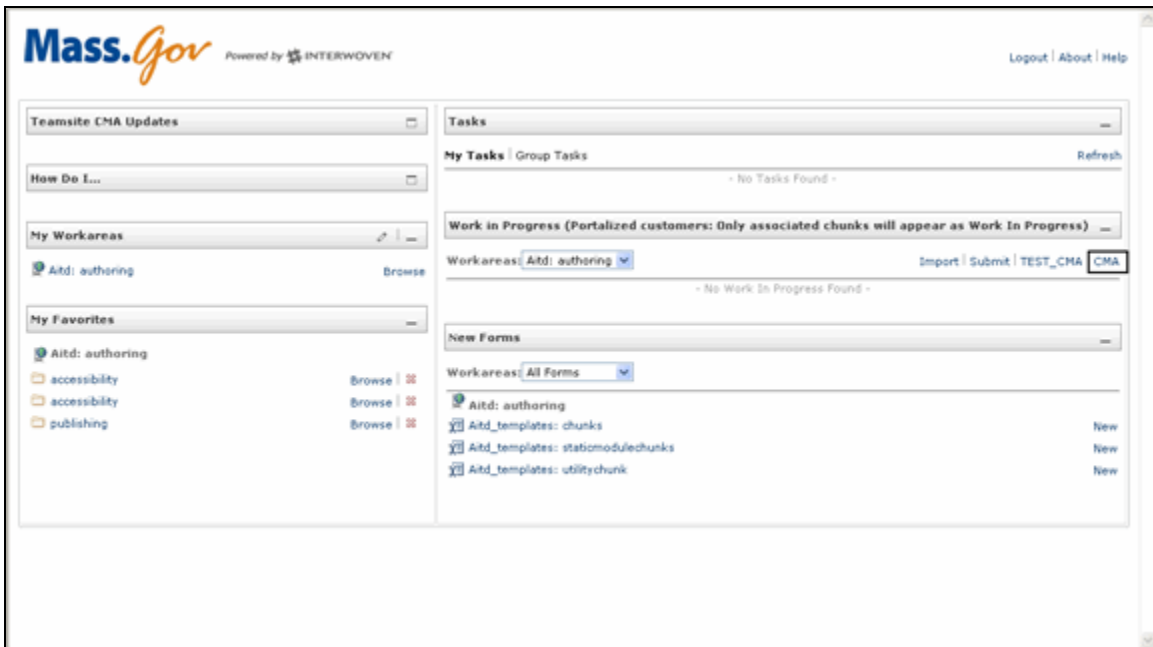
CMA Main Menu

Figure 30 shows the CMA main menu as displayed for non-Mass.Gov authors. Create Agency and Find Agency functions are unavailable.
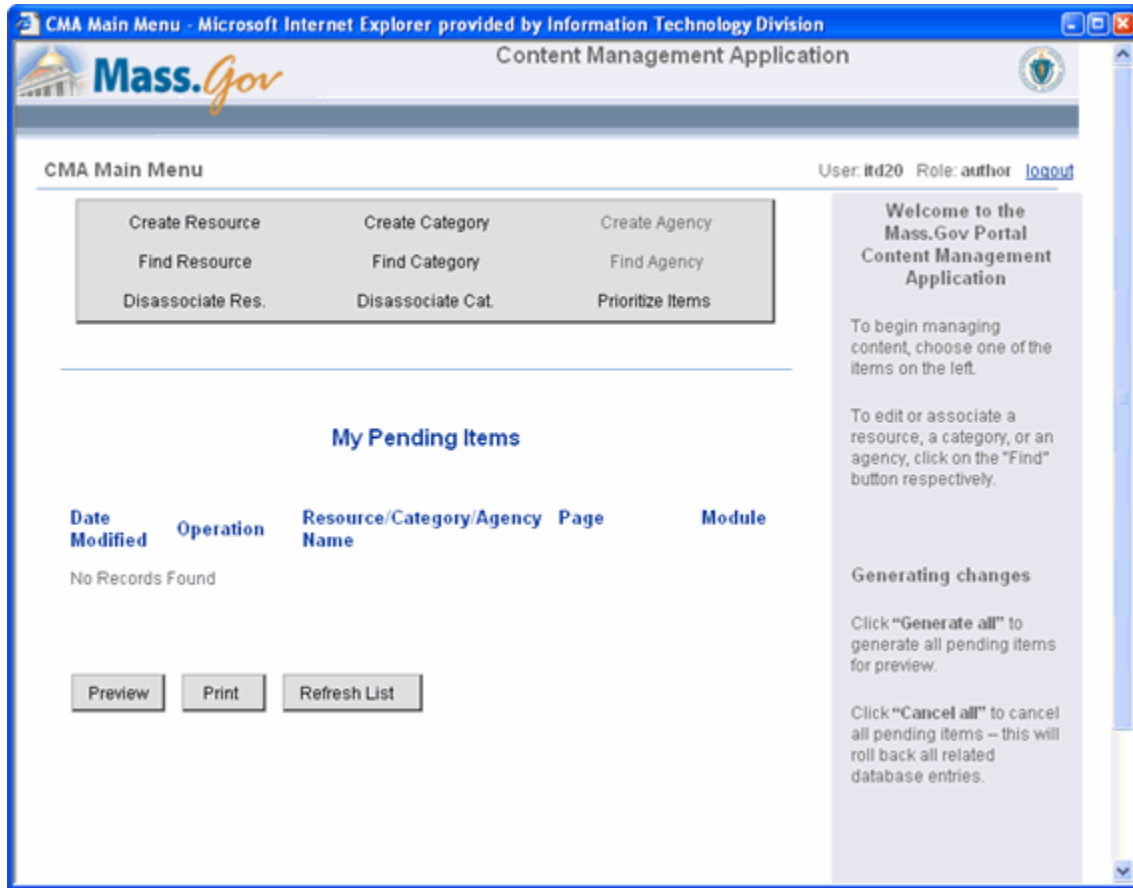
Figure 30. CMA Main Menu

CMA navigation is located on the upper half of the screen. A welcome message and some explanatory text are located on the right side of the screen.

The main menu presents the user with following options:

- Create Resource
- Find Resource (leads to Edit, Associate, and View Association)
- Disassociate Resource
- Create Category
- Find Category (leads to Edit, Association, and View Association)
- Disassociate Category
- Create Agency (Mass.Gov authors only)
- Find Agency (Mass.Gov authors only)
- Prioritize Items

Manage Navigation Categories

This set of user interfaces allows you to create, find, and edit navigation categories. Navigation categories are used to group related content under a single subject or theme. On Constituent Model sites (for example, Mass.Gov), navigation categories include constituents, topics, subtopics and sub-subtopics. For Topic Model sites, categories include topics, subtopics and sub-subtopics.

A category belongs to the website whose author created it. It can be re-used across multiple websites; however, it can only be edited by the authors of the originating website. Any changes to the category are automatically reflected in all places where the category is in use upon deployment of that change. Though the same category label may be used across multiple websites, each unique category path can have a label or short name with different descriptions.

Figure 31. Topics and Subtopics

Create or Find/Edit a Navigation Category

You can create or edit a category, or label, which may be used as a constituent, topic, or subtopic for grouping content on Mass.Gov, an Executive Office, or agency site.

To create a category:

1. From the CMA main menu (Figure 30), click Create Category.

2. Enter the Label and Short Name. Fields marked with a red asterisk are required (*).
    Label is the name, or title, of the category that will appear as the page title and navigational element (hyperlink). Examples of category names are Resident, Business, Family, Getting Around, Safety, and Health.

    Choose a name that will indicate to users the type of content to be found under the category. Names should be descriptive, yet concise.

    Category labels must be unique. You will get an error message if you attempt to create a category label that already exists. You have the option of re-using that existing category name, or changing the name and creating a new one.

    Short Name is an abbreviated name for the category. A short name is invoked only when the category is to be used as a subtopic and is designated to "bubble up" to appear in the center space of a Constituent Model site constituent page or a Topic Model site's home page under its parent topic.

    The short name field is optional; however, as a best practice, enter a short name even if you do not intend to bubble it up immediately. Another user may wish to re-use the category in a different location and may select it to bubble up.
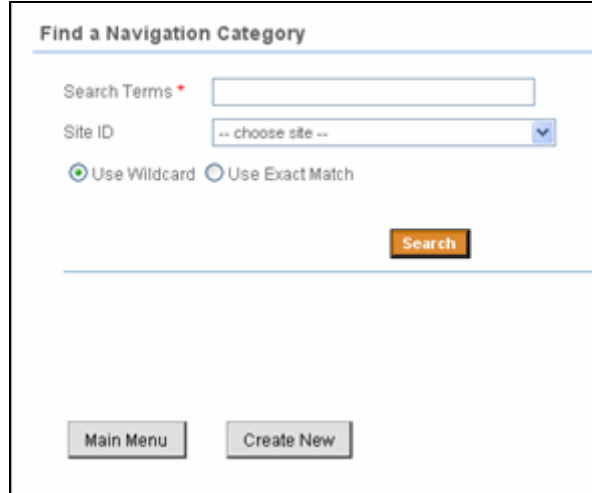
3. Click Create to create the category (or Update to edit a category).

To find and edit a category:

You can search for existing navigation categories for the purposes of either editing the category properties, or creating or removing an association with another category.

1. From the CMA main menu, click Find Category.

Figure 32. Find a Navigation Category

2. Enter Search Terms.
3. Choose a Site ID from the pull-down menu.
4. Choose Use Wildcard or Use Exact Match.
   Choose Use Wildcard if only part of the category name is known, or Use Exact Match if the full category name is known. By default, search functionality will place a wildcard both before and after the user-entered string.

5. Click Search.
   Note: If you do not find the category you are searching for, you can click Create New to create it.

   Entries found with a matching string are displayed on the lower half of the Find a Navigation Category page (Figure 33) and include Category Name, Site ID and the options to Edit, Associate, or Edit/View Description.

Figure 33. Find a Navigation Category Results

6. Click Edit next to a category name to update the category's properties.
   Note: The Edit button is only available to authors whose site ID matches that of the category. Edit and Associate buttons may not be available if the category is currently locked by another user. For information on locking refer to "Appendix C: TeamSite and CMA Locking and Error Messages" on page 71.

   Click Associate to associate the category with another category as described in "Associate Navigation Categories" on page 55. Click Edit/View Description to view or change category descriptions.

   Click Main Menu to cancel the search action and return to the main menu, or click Create New to create a new category.

7. Edit the category name and/or label, and click Update.

Note: Create Category and Find Category are for creating or updating the category only. Associating topics; that is, creating a hierarchical relationship between categories (for example, Safety fits under Resident), is accomplished by associating content as described in "Associating Content" on page 55.

From the create or edit screen, enter the properties of the category you want to create or update.

Create or Edit Category Confirmation Screen

The Navigation Category Confirmation screen is displayed when you click Create or Update on the Create a Category or Edit a Category screen. All fields are displayed in read-only mode, showing user-entered data for verification.

From this screen you can:

- Click Main Menu to return to the main menu.
- Click Associate to associate a category.
- Click Edit to return to the edit screen for this category (if, for example, you notice an error).

To appear on the portal, navigation categories need to be associated with each other via hierarchical, parent-child relationships, which create the path that an end user follows.

A category must be associated to another before it will appear anywhere on the website. Refer to "Associate Navigation Categories" on page 55 for more detail on associating categories.

Manage Content Resources

The lowest level of content is represented by a Resource in the database. This can also be referred to as terminal content. The term "terminal" was chosen because a resource represents the last stop on a navigation path. A user can go no deeper into the site along that path once reaching a resource page.

Resources can be re-used across multiple websites, but can only be edited by authors from the originating website. Any changes to the resources will be automatically propagated to all sites, pages, and modules where the resource is in use. Resources can be mapped not only to the center of the page, but to all dynamic modules, including Conduct Business, News & Updates, and Key Resources.

There are four basic resource types:

- **XML file** (for example, a chunk or utilitychunk)
  Example: A chunk named food.xml created as a resource in CMA with Title="Food and restaurants", ShortName="Food", Path="food.xml".

- **URL** to an on-site or off-site page
  Example: A URL to another site where a user could obtain a plumber's license, a resource would exist with Title="Get a plumber's license", ShortName="Plumber License", Path=http://www.plumberlicense.com/.

- **Minichunk** (simple text)
  A minichunk resource is a text label followed by some description that requires no formatting. It does not have a path, so that Path field is left empty.

- **Downloadable document** (doc, pdf, xls, ppt)

Each resource type has its own special properties, which are described in detail in the next section.

Resource Types and Characteristics

Documents

You must first upload a document file to your TeamSite docs folder before you can create a CMA resource. See "Importing Documents and Images into TeamSite" on page 16 for details on uploading documents to TeamSite.

In CMA, when you create a resource, you will see a drop-down menu for Type:

- Document - Excel (.xls)
- Document - PowerPoint (.ppt)
- Document - PDF (.pdf)
- Document – TXT (.txt)
- Document – RTF (.rtf)
- Document - Word (.doc)

The path/file name field should be populated with just the file name as it appears in TeamSite. Do not include the site name or docs/ folder portion of the path. For example: myfile.doc

If you copy the filename from TeamSite into CMA, be sure to verify that there is no extra space at the beginning or end of your filename.

If your site includes a large numbers of downloads, you may want to create subdirectories inside the TeamSite docs folder. If you do this, include the name of your folder, followed by a forward-slash, and then your filename, such as:

my_subfolder/myfile.doc

Document filenames should not include any spaces or special characters (ex. , & @ ! ? \ /) and must include the three letter extension (for example, .doc, .pdf, .xls). If the document file is not present in TeamSite, or the filename does not match exactly, the resource cannot be created.

If a document is only being linked to from a content chunk, you do not need to create a resource for that document in CMA, but you will still need to upload the document to TeamSite.

If you would like to create a resource linking to a document that is on an external site, it should be treated as a resource of type URL – External, and the path must include the entire URL, such as:

- ftp://ftp.comm-pass.com/Data/0111770019.pdf
- http://www.dls.state.ma.us/publ/misc/colmanf.pdf

Text

There is one type of text resource, known as the "minichunk." Minichunks consist of a label and a description, but do not have a path and will not link to anything when they appear as a resource on a topic or subtopic page.

Minichunks can be used to add descriptive text to a topic or subtopic page. There are several contexts in which you may want to use a minichunk. Some examples follow:

- You have an important resource (a hotline number) that should be displayed, requires only minimal text, but has no relevant landing page.
- You would like to provide context to a set of links on a page.
- You would like to provide a brief snippet of information without requiring the user to click to a deeper level.

Unlike content chunks created in TeamSite, minichunks cannot be formatted. They will display as simple text and cannot include bold or underlined text, bullets, tables or hyperlinks. They are created as resources directly in CMA by selecting Text – Minichunk from the type dropdown.

If you are creating a minichunk, you will leave the path field blank. Minichunk names must be unique. You must also click the Show Description box in when you are given the option to Prioritize. If you forget to do this and your description is not showing, choose "Prioritize Items" on the Main Menu.

URLs

There are two types of URL resources: internal and external.

An internal URL links to a page already on the Mass.Gov portal (or portalized agency site). When creating a link to any of these, the resource path need only be relative, meaning you do not include the "http://www.mass.gov" portion of the URL. Instead, include only the piece of the address from "/?pageID" to the end.

To create an internal link to the following page:
http://www.mass.gov/?pageID=mg2constituent&L=2&L0=Home&L1=Business&sid=massgov2

Only enter the following into the path field of the CMA resource screen:
/?pageID=mg2constituent&L=2&L0=Home&L1=Business&sid=massgov2

An external URL is one that links to a page outside the portal environment. This includes links to non-portalized state agency sites. An external URL must be absolute. It must include the full path to the target page, including "http://", "https://", or "ftp://". Examples of external URL paths:

- http://www.state.ma.us/dss/
- ftp://ftp.comm-pass.com/Data/0111770019.pdf
- http://www.state.ma.us/dph/topics/lyme.htm

If you are linking to a document on an external website, it is considered an external URL (URL – External) resource, and not a document resource.

XML Resources

To create an XML resource in CMA, the XML file must already exist in TeamSite. Its template type and folder location in TeamSite must match the XML type selected from the Resource Type drop-down menu in CMA.

There are several types of XML resources. The following are available on all sites:

- Content Chunk
- Static Module Chunk (feature stories)
- Utility Chunk

In addition to these, several sites have custom XML types. You see these types in the Resource Type drop down menu on the Create or Edit a Content Resource screen in CMA, but you will not be able to create a resource of that type unless it exists on your site. Some examples follow:

- EOHHS Press Release (EOHHS)
- MEMA Press Release (EOPS)
- MSP Press Release (EOPS)
- DOC Press Release (EOPS)
- Governor's Press Release
- Ozone Module (Mass.Gov only)
- EOPS Press Release (EOPS)

To update existing XML resources, make changes directly to the XML file in TeamSite as described in "Opening and Editing Content Chunks" on page 21.

Create or Edit a Content Resource

You can create a new resource or update an existing resource.

To create a resource:

- From the CMA main menu, click Create Resource and complete the fields as described in this section.

Figure 34. Create a Content Resource

To find and edit a resource:

1.   From the CMA main menu, click Find Resource.

Figure 35. Find a Content Resource

2.   Enter Search Terms.
3.   Enter a Resource Path by typing or pasting the file name (for content chunks) or the URL (for links.
4.   Choose Use Wildcard if only part of the resource name is known, or Use Exact Match if the full resource name is known. By default, search functionality will place a wildcard both before and after the user-entered string.

5. Select a Site ID or a Resource Type or both to narrow the search results. For information on resource types, refer to "Resource Types and Characteristics" on page 47.

6. Click Search.
   Entries found with a matching string and other selections are displayed on the lower half of the page: resource name, path, site ID and type, followed by Edit, Associate, and View Association buttons.

Figure 36. Find a Content Resource

In addition to creating or updating text resources, you can add an image as a resource. Associating resources to a page or modules occurs in a separate step. See "Associate a Resource with a Page or Module" on page 59.

The form contains basic information captured about the resource, plus (as presented below) it captures a number of metadata fields. In the future, these will be used to publish metadata with the HTML of a given page, and to build a more robust content management system. At this time, this metadata is not being published.

Click Edit to update the resource's properties, or Associate to associate it with a module and page. The Edit button is only available to authors whose site ID matches that of the category. You can associate resources originating on a different site. However, if an author from the originating site changes the resource label or path, this change will also be reflected on your site.

Note: Edit and Associate buttons may not be available if the resource is currently locked by another user. If you do not have access privileges to edit a resource, you may still associate it to a module and page on your site. For more information about locked resources, refer to "Appendix C: TeamSite and CMA Locking and Error Messages" on page 71.

Click Main Menu to cancel the search action and return to the main menu or click Create New to create a new resource.

7. From the Create or Edit a Content Resource screen, complete the fields as described next.

Figure 37. Edit a Content Resource

Label is the name, or title, of the resource that will appear as the hyperlinked text on the page where the resource is linked from, as well as the page title of XML chunk pages.

Short Name is an abbreviated name for the resource. A short name is invoked only when the resource is associated directly to a topic, and is designated to "bubble up" to appear in the center space of a Constituent Model constituent page or a Topic Model home page under its parent topic.

The short name field is optional; however, as a best practice, enter a short name even if you do not intend to bubble it up immediately. Another user may wish to re-use the resource in a different location and may select it to bubble up.

Description is an optional field, unless the resource is a minichunk, in which case it is required. It can be used to supply more detail about what a user may expect to find when linking to resources. You determine whether or not the description should be displayed on the Prioritize screen described in "Prioritize Elements on a Page or Module" on page 60.

Image Path is the path for the image associated with the resource (from TeamSite).
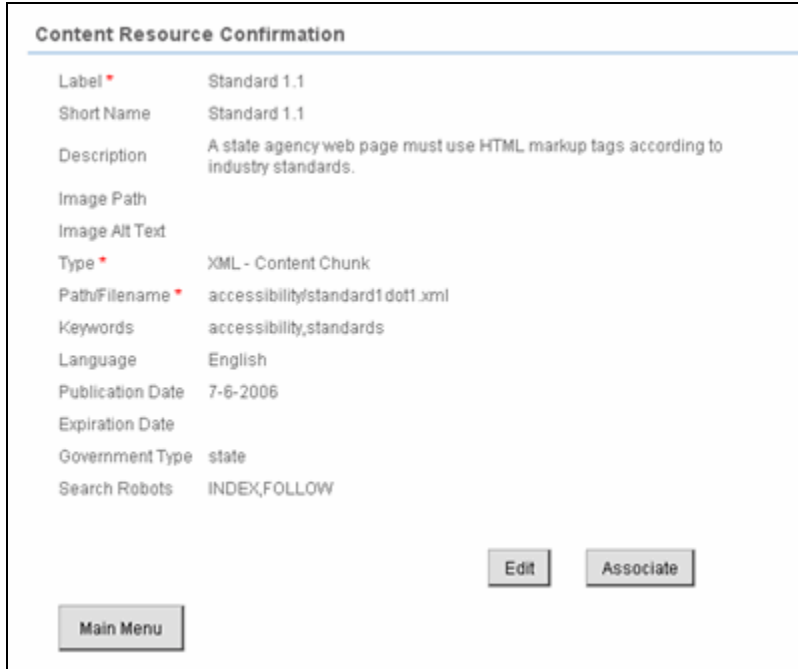
Image Alt Text is the alternate text that a user would see if image display is disabled or hear if using a screen reader.

Type refers to the type of resource the user wants to create.

Create or Edit Resource Confirmation Screen

The following screen appears when you click Create or Update on the Create or Edit a Content Resource screens. All fields are displayed in read-only mode, showing user-entered data for verification.

Figure 38. Content Resource Creation

From the Content Resource Confirmation screen you can:

- Click Main Menu to return to the main menu.
- Click Associate to associate a content resource.
- Click Edit to return to the edit screen for this category (if, for example, you notice an error)

For resource links to appear in the appropriate place on the portal, they must be associated with the related module and page level or path. They will not appear anywhere on the site until they are associated.

Metadata

Metadata is the information about your document hidden and embedded in your website page source code. The following information described how to add metadata elements to your Mass.Gov portalized website to improve your placement in Mass.Gov searches:

XML-Content Chunk and **XML-Utility Chunk** resources generate label (as title), description, keywords, language, and robots metadata elements. Category pages generate description metadata only.

- **Label** (freeform user entry field). This field creates the title on your page which:
    - Displays above your content.
    - Appears in the title bar for your page.
    - Is the page title in search results.
    - Is the title users see when they create a book mark or favorite.
  Using a descriptive page title is a critical part of optimizing your page results in search engines. An example of this field in the HTML code is below:

    ```
    <title>Mass.Gov - Infrastructure &amp; trade</title>
    ```

- **Description** (freeform user entry field). This should be a brief narrative statement that summarizes the content and purpose of the information.
  Descriptions appear in Mass.Gov search results making them more understandable. They also appear where the link to this content appears, as well as on the page itself. An example of this field in the HTML code is below:

    ```
    <meta name ="description" content ="By land, sea or air, Massachusetts has an
    extensive shipping, distribution and transportation infrastructure to support your
    business needs.">
    ```

- **Keywords** (freeform user entry field). Alternative terms such as synonyms, spelling variations, common misspellings, agency abbreviations, or acronyms that people can search for that do not appear in the body text. Use terms that your customers are likely to use, rather than agency jargon. List each term or phrase only once to minimize spamming penalties. Using terms not appearing in body text may lower page result rankings with certain external search engines. <mark>Comma separation is preferable for readability but not necessary.</mark> This content does not appear on your page, but is in the HTML code generated by the portal. An example of this field in the HTML code is below:

  ```
  <meta name="keywords" content="disabled housing,access modifications,removal of
  barriers,eviction,tenant's rights, rentals>
  ```

- **Language** (default is English). Use the default unless you are publishing in a foreign language. Example of HTML code:

  ```
  <meta name="language" content="en-us">
  ```

- **Government Type** (default is state). Use the default.
- **Search Robots** (default is INDEX/FOLLOW). Example of HTML code:

  ```
  <meta name="ROBOTS" content="INDEX,FOLLOW">
  ```

  - **NOINDEX** means that search crawlers will not index that page.
  - **NOFOLLOW** means that search crawlers will not follow the links on that page.
  - **NOARCHIVE** tells Google and other search engines not to create a cached copy of your page as a backup for display later.

Create a Feature Story

Feature stories are static module chunks, often combined with images that use a unique process from inception in TeamSite to publishing through CMA.

Create a Static or Utility Module Chunk File in TeamSite

To create a static module chunk file:

1. In TeamSite, select New to the right of the staticmodulechunks template in the New Forms workarea.
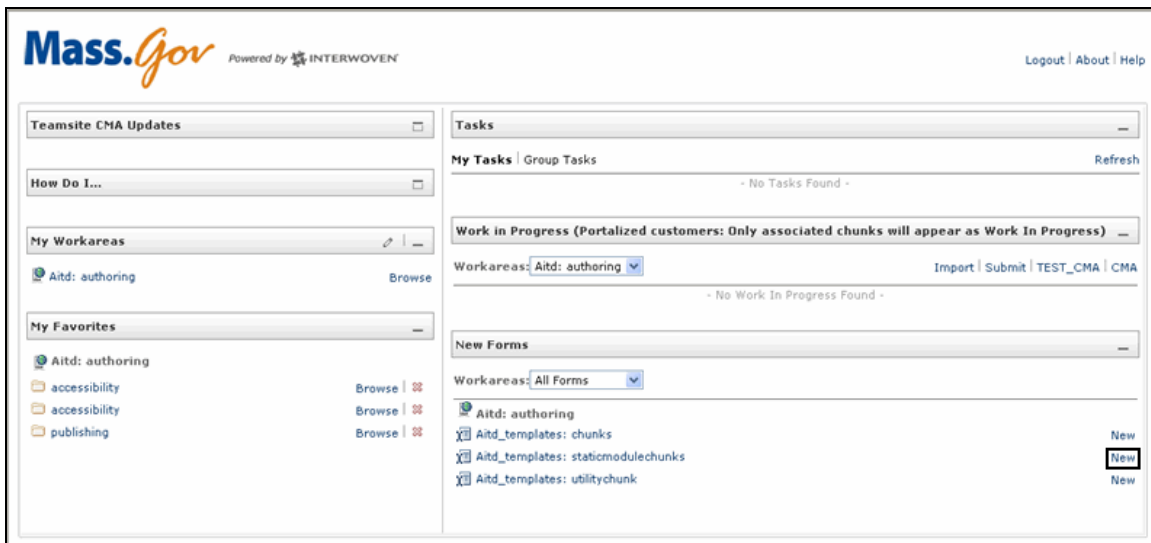
2. Create content in a static module chunk as you would for any other chunk. Limit the amount of space used in this chunk to two to three paragraphs because this content is associated to your home page and will "push" important topics out of a user's view. If your story is longer than three paragraphs, you can link the full story to this chunk. If the full story is content included in your site's information architecture, type a link that describes what you are linking to after the initial three paragraphs and hyperlink it to this information. For example, the link should either be "more about Wonderful New Program" or have a title attribute, which would need to be input in the HTML. If this is content that does not exist in your site's information architecture, you need to create a Utility chunk.

To create a utility module chunk file:

1. In TeamSite, select New to the right of the utilitychunk template in the New Forms workarea.

2. Type or copy and paste your entire feature story in this chunk. Save your chunk and go to your website. Copy the URL for any utility chunk on your site (Welcome, Bio, Site Policies, Contact Us, etc). Open the static module chunk and type a link that describes what you are linking to after the initial three paragraphs and hyperlink it to this information. For example, the link should either be "more about Wonderful New Program" or have a <title> tag, which would need to be input in the HTML. Paste the URL you copied from your site in the dialog box **changing** the text following the last = to the name of the utility chunk you just created. Do not add the .xml extension.
For example; you named your utility chunk fs_tax_deadlines.xml and the Utility URL you copied from your site is:

   http://www.mass.gov/?pageID=deasutilities&L=1&sid=Deas&U=deas_bio

The URL that you will paste in the hyperlink dialog box in your static module chunk will be:

   http://www.mass.gov/?pageID=deasutilities&L=1&sid=Deas&U=fs_tax_deadlines

I**mportant:** You need to create resources for both your static module chunk and your utility module chunk for the information to display on your site.

Using Images in your Feature Story

You must crop and resize all images before you import them into TeamSite. The standard size for feature photos is 122 x 80 pixels.

If you cannot find an image that is appropriate for your story, you can find new images at www.photos.com. To obtain images for your site, open an E2E ticket with the photo number and desired size in the description. Once you have obtained the image, you must crop or resize it to 122 x 80 pixels.

Upload an Image in TeamSite

To include the image in your Feature Story chunk, you need to upload the image to TeamSite.

To upload an image to TeamSite:

1. Navigate to the images folder for your site in TeamSite. In Mass.Gov, navigate to the featurestory folder in images.
2. Import the image into this folder. For more information, refer to "Importing Documents and Images into TeamSite" on page 16. You may want to create a folder just for feature stories (like in the example of Mass.gov above) or you can adopt a basic naming convention for these images. For example; you can add fs to all feature story image names. You must import your image for others to be able to see it on your site.
Note: Copying and pasting an image into a chunk will show the image on your computer only. Others will see a red "x" indicating an error with the image.

Add an Image to a Chunk

To include the image in the chunk:

1. From TeamSite, locate and open your chunk file by clicking Edit.
For more information, refer to "Opening and Editing Content Chunks" on page 21.

2. Position your cursor where you would like the image displayed.
3. Click the Insert Image icon.

4. Click Select New File.
5. Browse through the images folder to find the image file that you want to include into your chunk.
6. Select it and click OK.

Getting Ready to Publish

To publish the feature story:

1. In CMA, click Create Resource. Complete the following fields in the Create Resource window:
Label: Required field, but note that label will not display for feature stories (the headline that does display is part of the chunk). Enter something brief that makes sense for CMA searches.

Short Name: Does not display for feature stories; leave blank.

Description: May be left blank but because it is also a metadata field, it will display for feature stories that appear in the search results.

Resource type: XML – Static Module Chunk.

Path/Filename: The exact name of the chunk.

Keywords: Enter keywords relating to your story, extent to which they help may be limited.

Language: Leave as default (English).

Publication Date: Use today's date if publishing immediately, otherwise, post date for deferred publishing.

Expiration Date: Optional at this time.

Government Type: Leave as default (state).

Search Robots: Leave as default (ALL)

2. Click Create.
3. Click Associate.
    Module ID: Feature Story

4. Click Save Association.
5. Click Prioritize. Then locate your feature story (which should be priority 100) and give it priority 1. Change the preceding feature story to priority 999.

Associating Content

After you have created categories and resources, the next step is to associate content. Associations between categories build the website's navigational hierarchy by establishing parent-child relationships. For example, Home is the parent of all; Resident is a child of Home, but it is also a parent of Safety and Environment; Environment is the parent of Air Quality, and so on. Essentially, each time two categories are associated, a new page is created with all of its related modules.

To appear on the portal, navigation categories need to be associated with each other, creating the path that an end user follows. Navigation categories consist of constituencies, topics, and subtopics and are created according to the following rules:

- Topics must be associated with Constituents (for Constituent Model websites).
- Subtopics must be associated with Topics.
- Sub-subtopics must be associated with Subtopics.

Associate Navigation Categories

You can access the Associate Navigation Categories screen either from the Find Category screen or from the Navigation Category Confirmation screen after you have created or edited a category. For more information, refer to "Manage Navigation Categories" on page 42. Use the drop-down menus to create a navigational hierarchy, attaching your just-created or selected category to the selected levels.

Figure 39. Find Navigation Category

When you enter the Associate/Disassociate a Navigation Category screen, the lower half is not populated. The title of the category selected on the Find, Create, or Update page is displayed under the page title as the Active Category.

You can only associate categories on the site to which you belong. Therefore, the Site ID is pre-populated and non-editable. You can associate categories originating on a different site, but be aware that if an author from the originating site changes the category label, this change will also be reflected on your site.

To associate a category:

1. From the CMA main menu, click Find Category.
2. Pick the category names for each level of the hierarchy to which the category should be attached.
    Always begin with Home. On Constituent Model sites, the next level is Constituent. The Constituent drop-down menu is populated with only those categories mapped directly to Home, for example, Constituent choices for Mass.Gov will be Resident, Business, Visitor, Public Employee and State Government.

    On a Topic Model site, the next level is Topic and includes those categories mapped directly to the home page.

    As you make each selection, the next drop-down menu displays those categories mapped directly to the previous selection.

Figure 40. Associate/Disassociate a Navigation Category

3. Click:
    - **Show All** to list all categories already associated to this selection in the lower portion of the page.
    - **Save Association** to list all categories already associated to this selection and to add the active category.
    Results display in order of priority, with the new category added to the bottom of the list.

Note: Only category associations are displayed on this page. Category associations create the navigation hierarchy or page levels of the website. They are not module-specific, and you will therefore not see any resources on this page that can also be mapped to a specific module on the hierarchy selected in the drop-down menus.

If you do not click Save Association before clicking Main Menu or Prioritize, no association will be made.

Disassociate a Category

Some results are followed by a Disassociate button, which allows you to remove an association between categories (lowest relationship only).

You can only remove a category association if no further categories or resources are associated to that hierarchical path. If any children (resources or categories) are associated to that category mapping, the Disassociate button is not displayed. Disassociations must be made from the bottom up. This prevents users from removing categories with multiple child associations. If no children exist, the screen refreshes with the record removed.

The process requires disassociating all resources from a category first, then returning to Main Menu and generating (and approving the changes in TeamSite). Then you can disassociate the category itself, following the same process.

Once you have added or removed the desired associations, you may either return to the main menu or click Prioritize to update the order in which your new association appears.

The same screen used for associating categories is also used to disassociate categories. You remove category associations by clicking Disassociate Category from the main menu.

Note: Categories can only be disassociated from their parent if they have no child category or resource associations for any module (for example, Center Content, Online Services).

Associate a Resource with a Page or Module

Associations between resources, modules, and pages (categories) build out the website's content. These associations fill out the content in each of the dynamic modules on the website.

To associate a resource with a page or module:

1. In CMA, from the Resource Confirmation or Find Resource screen, from the drop-down menus select a module and a page in the navigational hierarchy where you want to attach the resource.
2. Pick the category names for each level of the hierarchy to which the resource should be attached.
    Always begin with Home. On Constituent Model sites, the next level is Constituent. The Constituent drop-down menu is populated with only those categories mapped directly to Home, for example, Constituent choices for Mass.Gov will be Resident, Business, Visitor, Public Employee and State Government.

    On a Topic Model site, the next level is Topic and includes those categories mapped directly to the home page.

    As you make each selection, the next drop-down menu displays those categories mapped directly to the previous selection.

    Certain rules exist for attaching resources to a given page and module. The following rules for creating associations are outlined by module:

    -   **Static Modules** – A single association of an XML file to the home page or constituent page exists for each static module in the database already. With the exception of feature stories, only a site administrator or more technical author should be responsible for editing these files. These include the Feature Story and Welcome modules.
    -   **Dynamic Modules**:
        -   **Center Content** – The center area (or primary content area) of the pages. Resources can be assigned directly to the topic level and below. (Resources cannot be associated to Home or Constituent level for the Center Content module.)
        -   **Online Services** – Resources can be associated to Home, Constituent, and Topic levels on Constituent Model sites and Home and Topic levels on Topic Model sites. You cannot associate resources to any page level below these; however, subtopic and terminal content pages automatically inherit associations made at the topic level.
        -   **News & Updates** – Resources can be associated to Home and Constituent levels on Constituent Model sites, and Home level only on Topic Model sites. You cannot associate resources to any page level below these.
        -   **Feature story** – Resources can be associated to Home only. You cannot associate resources to any page level other than Home.
        -   **Key Resources** – Resources cannot be associated to any level other than Home (excluding Mass.Gov).

    For resource links to appear in the appropriate place on the portal, they must be associated with the related module and page level or path.

    The title of the resource selected on the Find page is displayed under the page title as the Active Resource. You can only associate resources on the site to which you belong. Therefore, the Site ID is pre-populated and non-editable.

3. Click:
    -   **Show All** to list all categories already associated to this selection in the lower portion of the page.
    -   **Save Association** to list all categories already associated to this selection and to add the active category.
    Results display in order of priority, with the new category added to the bottom of the list.

    An error message will appear if you attempt to associate a resource to a module at page levels where the module does not exist.

Results display in order of priority, with the newly added resource at the bottom of the list. Note that only resource associations will be displayed on this page. You will not see subcategories listed in the lower portion of the page.

Once you have added the associations, you can return to the main menu or click Prioritize to update the order in which they appear.

If you do not click Save Association before clicking Main Menu or Prioritize, no association will be made.

Disassociate a Resource

The same screen used for associating resources to pages and modules is also used to disassociate resources. Click Disassociate to remove the association between a resource and the chosen page or module. The screen will refresh with the resource removed.

You can also remove the association between a resource and the chosen page and module by clicking Disassociate Resource from the main menu.

Prioritize Elements on a Page or Module

Prioritizing determines the order of the resource and category entries on a given module or page.

You can prioritize several pages from the same screen. You must simply make page and module selections as described below, set priorities, click Update, and, when the screen has refreshed to reflect the changes, make a new selection from the drop-down menus on the upper portion of the page, and repeat.

The Center Content Module, or center portion of the page, may have a mixture of both resources and categories that need to be prioritized together. For example, a topic page may have links to three resources and three subtopics and the order may need to be intermingled. All other modules, however, include resources only.

To prioritize entries:

1. From the CMA main menu click Prioritize Items or Associate/Disassociate a Navigation Category, click Prioritize.
   If you enter the prioritize screen from an Associate Category or Associate Resource screen, the upper portion will be pre-populated with the selections from the previous screen. If you enter the prioritize screen from the main menu, only the Site ID (determined by user login) and Level 0 (Home) lines will be populated on the upper portion of the screen, and the lower half will not be populated. The default module is Center Content.

2. To prioritize, pick the module and page on which to prioritize the entries. Module and Level drop-down menus are dynamically populated depending upon your site and selections.
3. Click Show All to see all existing resource (and category) associations, in their priority order, for that module and path.
4. Use priority input boxes to determine order of items on a page. 1 is the highest priority.
   Depending on the module and level chosen, you may be presented with additional options: If you are prioritizing the Online Services Module, you will not have options for Show Description or Bubble up?. The same holds true for any static modules, and for the Center Content module at the home and constituent levels.

For Center Content module items on topic pages and below, the following selections are or may be displayed:

- **Show Desc** checkbox (Center content topic pages and below) – Display a description under the resource label. (This option also appears for the Key Resources module on agency sites.)
- **Show Image** checkbox (Center content topic pages and below) – Display an image along with the resource descriptions.
- **Bubble Up?** checkbox (Center content topic page OTHER?) – If you are prioritizing items that appear in the Center Content module on a topic page, you are also presented with the option to "bubble up" certain items.
  You can check up to four items to bubble up for display on the Constituent or Topic Model home page. The short names for the checked items will display as shown below on your website.

5. Click Update to display the screen with updated priorities.
Note: Be sure to wait for the screen to refresh before clicking the Main Menu link or your updates may not be saved.

Creating an Agency Landing Page

An agency landing page uses a three-column format, with static modules in the left and right columns and main content in the middle column.

Figure 41. Example of an Agency Landing Page

You can create an agency landing page at the topic page level of a Constituent Model or Topic Model website. The topic level is the third level down for a Constituent Model website and the second level down for a Topic Model website.

To create an agency landing page:

1. From the CMA main menu, click Prioritize Items.
    The Module ID defaults to Center Content, and Home defaults to Home.

2. For a Constituent Model website, select a Constituent and a Topic. For a Topic Model website, select a Topic.
3. Click Show All.
    An Agency Landing column is displayed in the list of resources and categories. Check boxes are displayed for categories, but not for resources.

4. Check the Agency Landing check box to create a three-column agency landing page.
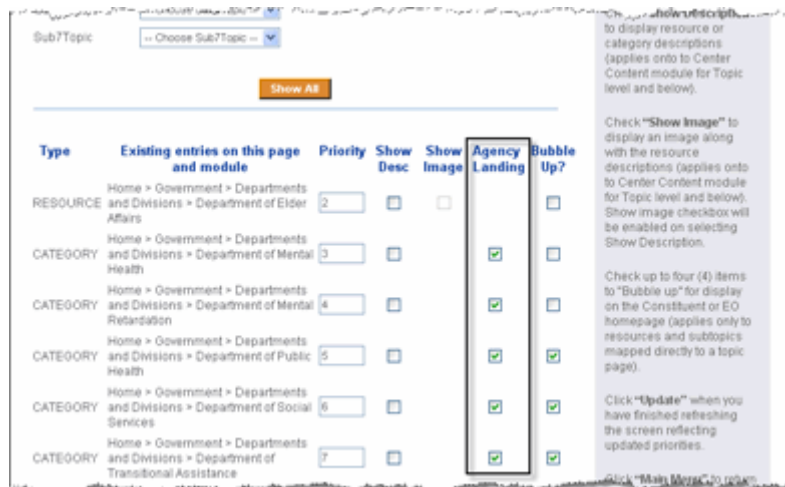
Figure 42. Agency Landing Checkbox

5. Click Update.

Important: The URL for an agency landing page is different than the URL for a standard page in the two-column format. If you change a page from a standard page to an agency landing page or from an agency landing page to a standard page, check for broken links.

News & Updates Publication Date

If you are prioritizing items on the News & Updates module, the Pub Date is displayed.

News & Updates entries are ordered by their priorities, just as with other modules. However, the publication date determines when headlines will actually display on the live site.

Headlines are only generated and displayed in the News & Updates module and archive landing page if they have a pub date of the current date (today) or earlier, and an expiration date of the current date (today) or later. Therefore, publication date can be used to defer publication of a headline, while expiration date can be used to remove a headline from the list.

Refer to "Appendix D: Nightly Content Regeneration (CRON) Job" on page 75 on the nightly batch job to read more about deferred publishing. Also refer to "Appendix F: Structural Elements and Standards for Modules" on page 82 for more details on managing the News & Updates module.

Content Re-use: Chunks vs. Cross-Linking vs. Re-creating

Content re-use provides users with multiple navigation paths to a given category of content. There are three basic approaches:

- Content chunks
- Cross-linking
- Re-creating associations selectively

Each approach has pros and cons.

Sample Situation for Content Re-Use:

There is a topic called Outdoor Activities. Its parent association is the Visitor constituency on Mass.Gov; its child associations are to various subtopics and resources. You want this information to also be accessed through the Resident constituency.

Content Chunks

You create a content chunk file in TeamSite with all of the information relevant to outdoor activities, including descriptive text, links to other websites, and reference information. You then creates a resource mapped to this chunk in CMA called Outdoor Activities, which can be associated to multiple places on the portal. Each place it is re-used reflects the breadcrumb and Online Services links of its local context.

Pros:

- Allows more complex formatting, use of headings, sub-headings, and bullets, inline links within text, etc.
- Allows re-use of content as a whole fairly simply (addition of one resource and association in each place it is used).
- Both change of properties of this resource (label, description, and short name) and additions/subtractions to its content automatically propagate to all places where it is in use.
- The user's breadcrumb is maintained within the local/current context with each new association of the chunk. The user jumps to a new location in the structure of the website when accessing the chunk link.
- Ability to measure click patterns/usage of each location the content chunk is used (web metrics).

Cons:

- Must be re-used as a whole. No selective re-use of links from this page.
- Resources (chunks) may not be mapped directly to a constituent on a Constituent Model site or the home page on a Topic Model site. In the example above, Outdoor Activities is a topic under Visitor. If it were created as a chunk, it would not be at the topic level. Because this is one level down, it means less visibility for the content.
- Requires offline communication and monitoring to ensure that updates to content are appropriate in all places referenced. This becomes more complicated if multiple authors manage sections of site where content is referenced, or if referenced on multiple sites.

Use this approach if:

- Content requires complex formatting (tables, multiple subheadings, bullets, numbered lists).
- Content will always be used as a whole.
- Content does not need to appear at the topic level (mapped directly to Mass.Gov constituent or EO home), but can appear underneath a topic.

Cross-Linking

Cross-linking means creating a resource that is an internal link to another page on the portal. In the example above, assume the original author did not create a content chunk, but rather, created a topic called outdoor activities, with includes a series of subtopics and resource links to external sites including brief descriptions. Cross-linking in this case would mean creating an internal link resource called "Outdoor Activities" which links directly to the topic page within the visitor constituency. Because only topics can be associated directly to constituencies, this resource must be associated to an appropriate topic within Resident, and is therefore one level deeper than the original topic in the Visitor constituency. When a user clicks the cross-link, he or she will jump to a new location within the website structure, and therefore a new breadcrumb (that of its original location).

Pros:

- Very simple to implement.
- Relatively easy to maintain – Additions or subtractions of subtopic or resource associations and changes to prioritization made to the original category will all be accessed via the cross-link with no additional effort. This includes not only center content, but also relevant Online Services links on the original topic page.

Cons:

- User loses navigation path (breadcrumb), which he or she may not expect or realize, especially because both the referring and destination page are within the portal and have a similar look and feel.
- A change to a category's label property will break a cross-link because category page URLs are based in part on category labels.
- Resources (internal links) cannot be mapped directly to a constituent Constituent Model sites or the home page on Topic Model sites. In the example above, Outdoor Activities is a topic under Visitor – if a cross-link resource were created, it would not be at the topic level. Because this is one level down, it means less visibility for the content.
- You cannot measure usage of the added click pattern through web metrics. Counts related to the target page will not distinguish which path was used to reach it.
- Content must be re-used as a whole, there is no selective re-use of links from this page.
- Offline communication and monitoring are required to ensure that updates to content are appropriate in all places referenced. This becomes more complicated if multiple authors manage sections of site where content is referenced, or if referenced on multiple sites.

Use this approach if:

- Preservation of the breadcrumb is not important for usability.
- The category's label is unlikely to change.
- The category's associations and prioritizations could change frequently or extensively, or the category to be re-used is very large, with multiple sublevels and many resources.
- Ability to measure the additional navigation paths is not important; for example, perhaps tracking matters less when re-using subtopics within the same constituency or topic.
- You are willing to periodically review the original page to ensure that any changes to its content have not made it irrelevant to your link label or context (context of the cross-link point).

Re-create Associations

Re-creating associations basically means re-using the original category in a new place, and therefore creating a new page that is essentially a blank slate with the same label as the original. In the example above, the Outdoor Activities category would be associated to Resident, and some or all of its child associations in the center area, as well as any Online Services links would be associated to the new page. This would involve several Find and Associate operations in CMA.

Pros:

- Preserves the user's actual navigation path (breadcrumb) to and through the topic.
- Ability to measure click patterns/usage of different navigation paths to the same content.

- Changes to category/resource properties will propagate automatically to copies. Properties for categories consist of label, description, and short name. Properties for resources consist of label, description, shortname and URLs or paths.
- Allows selective re-use of content if certain links are appropriate in one context, but not in the other.
- Allows re-use of same content under a different category label; for example, about two-thirds of the links under "Resident > Cars & Transportation" are re-used under "Visitor > Getting Around".
- Allows the categories to grow independently of each other. While the categories may start out identical, over time, each author may choose to add resources or subtopics that are more constituent specific, without those propagating to another author's page where the context may be inappropriate.

Cons:

- Depending on the complexity and number of associations the category has, re-creating them to begin with could be a time-consuming, error-prone process.
- Addition or removal of resources or subcategories under the original category does not propagate automatically to copies. Once associations have been recreated, maintenance of identical associations and prioritizations will be manual and dependent upon offline communication.

Use this approach if:

- Preservation of the breadcrumb is important for usability.
- Ability to measure different click patterns from start to finish is an important metric.
- The category's associations will not undergo extensive or frequent changes or you are comfortable with the communication and maintenance effort involved.
- You would like to re-use only some of the child associations of that category, and/or you would like to group the children under a different label.

Generating and Deploying Content

Process Overview Diagram

The following diagram provides a high level overview of the content creation, generation, and deployment process. Content creation (importing and submitting images and documents, creating and editing XML content, and creating and updating content via CMA) has been covered in detail in previous sections of this document. The following pages provide details on content generation, preview, and deployment to production.
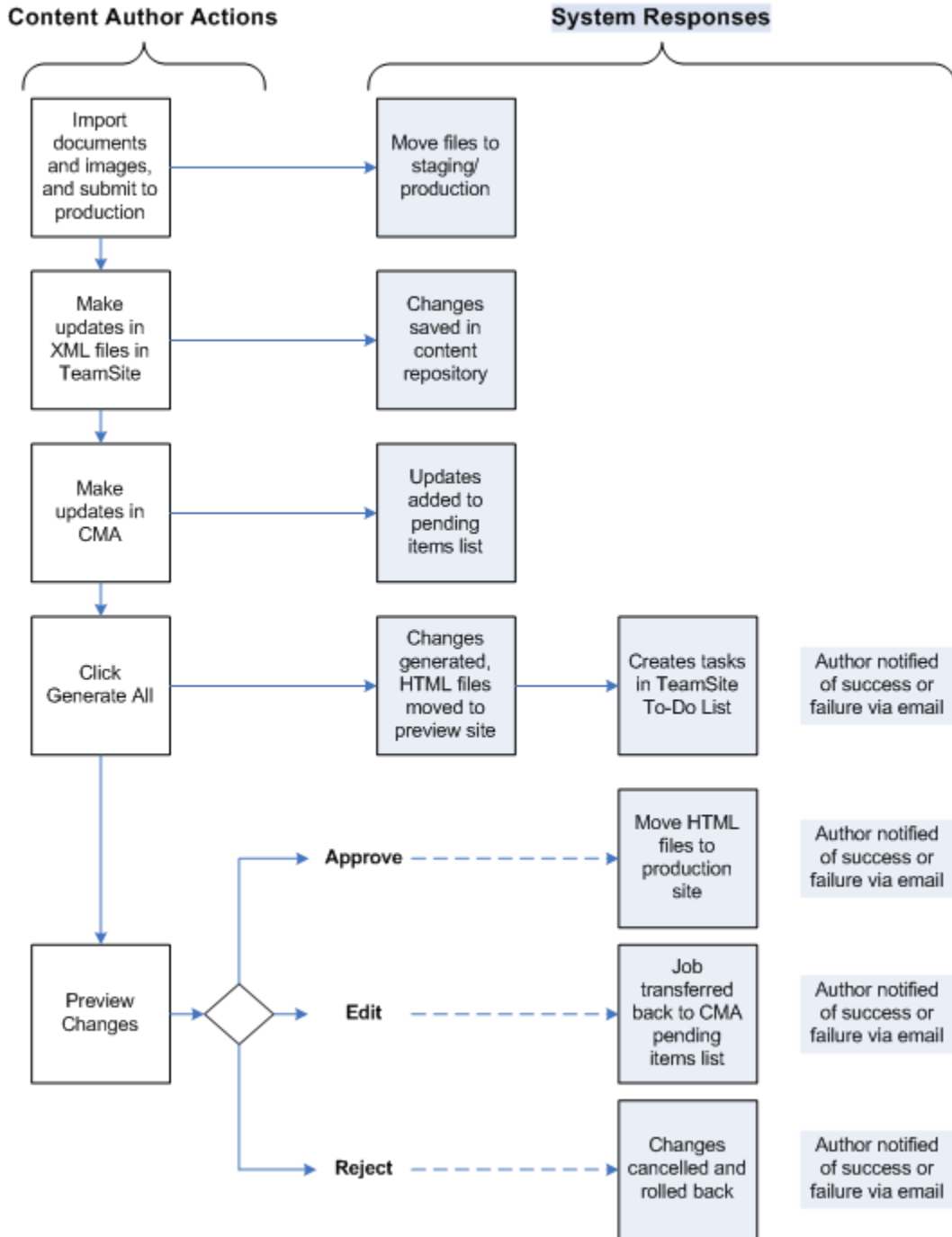
Figure 43. Generating and Deploying Content: Process Overview Diagram

CMA User Pending Item List: Generate Updates

Each activity you undertake (create, edit, associate, disassociate, prioritize) is added as an entry on your Pending Item List. This list of pending items signifies those changes that have been made, but that have not yet been generated for preview.

Essentially, all additions, edits, and associations (and disassociations) will result in additions to the pending items list:

- CMA actions performed on content resources (links, XMLs, documents).

- Actions performed on navigation categories (constituents, topics, subtopics).
- Creation or deletion of an association between two navigation categories, or between a resource and a navigation category and module.
- Update to priorities of resources (and/or categories) on a given page or module.

In addition, edits to XML files that take place in TeamSite also require a regeneration before changes will be reflected in the production site. Once XML file changes are complete, from CMA you must find the related resource entry and "touch" the entry (open the edit screen and click update). This adds the resource update to the pending items list for generation.

Your pending items are included in the lower portion of the main menu page. The pending items list includes the date modified, the basic operation performed, the name of the resource or category operated upon, page (if applicable), and module (if applicable). Logging out of CMA and/or TeamSite will not result in any action on items on the pending items list. The list will reflect the same entries the next time you log in.

Click Generate All to generate all pages for preview that have been affected by the changes you have made. This applies to all activities performed since the previous generation.

Click Cancel All to cancel (undo) all activities performed since the previous generation

You can generate after each task performed. However, it is recommended that related tasks be generated together, such as multiple actions to the same page and module, and generated in small batches. Actions that span several modules and/or pages should be generated separately.

Keep in mind that approvals, edits, or rejections applied to tasks submitted as a batch will apply to the whole batch. Once grouped, they remain grouped.

Once you have clicked Generate All, the following message is displayed while the system generates your changes:

Please wait while this operation continues. This may take several minutes.
The more changes you have made since the last time you generated, the longer this will take.

Upon successful generation, you will receive an email confirmation from Web, Work listing all pages and files that have been generated.

Preview Updates

Content generation updates the HTML files for all pages and modules affected by your changes. These files are placed in the preview environment so that you can verify your changes before moving them to the live website.

Once the generation has completed, you are returned to the CMA main menu. Your pending items list should be cleared.

Click Preview to link to the preview site and verify changes. This opens a new browser to the home page of your site in preview. Navigate to those pages you have updated to verify all changes. Refer to your printout of your pending items list.

The preview environment is shared by all authors and will show any changes by other authors that have been generated but are still pending approval/publication.

A change to a single resource or navigation category may have an impact on multiple pages—it is the author's responsibility to preview all pages affected by the change—an approval/publication is assumed to be approval of all impacted pages.

Example: Adding a resource or subtopic to a topic page will change the site map and can potentially change the constituent page (if the addition is marked to bubble up).

TeamSite To-Do List: Approve, Edit, or Reject

Each time you generate changes from the CMA main menu, a task is added to your TeamSite My Task list, found on the Tasks area of the interface. Once you have previewed your changes, return to your TeamSite window.

To approve, edit, or reject a task:

1. Click Approve, Edit or Reject changes to open the task.

<mark>Click the Finish link in the far right column to open the task transaction dialog box and complete the task.</mark>

2. Choose one of the following:
   - **Approve** – Pushes all HTML files for the selected batch into production.
   - **Edit** – Returns all items in the batch to the CMA pending items list so you can edit and preview again before publishing.
     If you chose to edit your batch, return to CMA to make further changes. The items from the batch should be in your pending items list. If they do not appear, click Refresh List on the main menu. Do **not** use your browser refresh button or the F5 key: this will result in an error.

   - **Reject** – Rolls back all database changes and refreshes preview site HTMLs from production so that both are in sync. TeamSite XML file changes will not be rolled back.
   All three choices remove the task from your task list.

3. Click Done. You will then return to the TeamSite home page, and the task will no longer be in the task pane.

5 Appendices

Appendix A: Installing Visual Editor

Visual Editor, integrated into TeamSite, is a browser-based "What You See Is What You Get" (WYSIWYG pronounced wiz e wig) web content authoring and editing tool. The first time you edit a content chunk, you will need to install Visual Editor onto your local machine. This process only takes place once. Afterwards, Visual Editor will be automatically available. You will need administrative access on your local machine to install software. If you have trouble downloading this software, contact your network administrator to ensure that you have the correct permissions on your machine.

Internet Explorer 6.0 is recommended for use with Visual Editor. IE version 5.5 can also be used, but IE version 7.0 **cannot** be used.
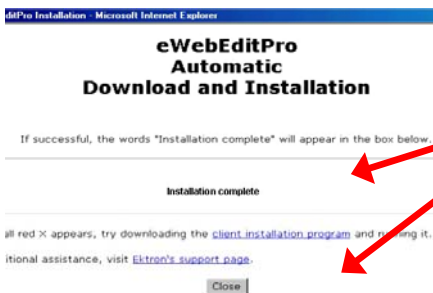
To install Visual Editor:

1. When you create or edit a content chunk for the first time, you will be prompted to install Visual Editor. (If the prompt does not pop up automatically, look for a link below the HTML paragraph field in the content chunk that states Click to edit with Visual Editor.)
2. In the Visual Editor Automatic Download and Installation window, click Install Now.
3. Click Yes when prompted (one or more times by Ektron or Microsoft) to verify that you want to download and install this application.
4. Click OK when the downloading is complete and you are prompted to install Visual Editor now.
   When the download is complete, Installation Complete is displayed in the Download and Installation browser window.
5. Click Close.
6. When prompted, reload the content chunk you opened initially in order to initiate Visual Editor.

Appendix B: Installing Local File Manager

<mark>From the TeamSite/CMA Training Manual</mark>

Local File Manager is used when you import files and when you edit a file directly from TeamSite. It installs itself on first use by running a signed, but uncertified Java applet.

To trust the signed Interwoven applet:

1. When you are prompted with the Warning – Security dialog box with the following question:

    Do you want to trust the signed applet distributed by "Interwoven Internal"?

    click Always.

    Note: If you click Yes, you will see this dialog box again the next time Local File Manager runs.

2. Specify the default location for the TeamSite temporary files:
    C:\IWTEMP

There are a few situations when you cannot specify the default:
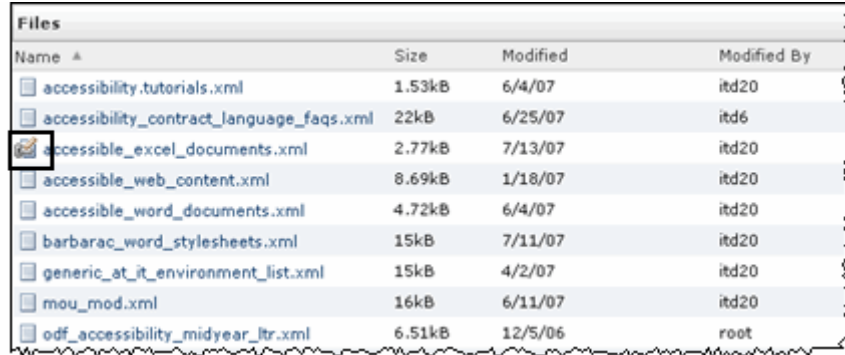
*   You are not permitted to access your C: drive due to administrative lockdown. Either contact the system administrator of your computer system or choose another path where you have rights to read and write, such as your home directory on a network server.
*   You have very little disk space on your C: drive.
Note: The first time Local File Manager installs, it copies the Java applet to your computer and may be slow to present you with the installer.

Appendix C: TeamSite and CMA Locking and Error Messages

Locked Files in TeamSite

When a chunk has been submitted to staging only, the chunk is locked. This prevents another version of the chunk from being placed on staging or production until you either approve or reject your chunk.

Figure 44. TeamSite File List with Locked File

In order to unlock the task, you must either:

- Approve the task, putting the chunk or file into production.
–or–

- Reject the task, rolling the version on staging back.

CMA Locking

CMA has a number of locking mechanisms in place to prevent multiple authors from changing the same piece of content at the same time. This prevents loss or corruption of data and is similar to locking of XML files in TeamSite. No two authors may edit the same resource, category or page and module combination at the same time. The locks are released and other users may access the content, once operations are complete. Complete means that changes have been generated in CMA, and the TeamSite task has been either approved (published) or rejected (cancelled and rolled-back).

Because content is interrelated, editing one item may also lock others. Following are the basic locking mechanisms:

- When you edit a resource, category, or association, that record will be locked for all other users.
- When you create a new association between a resource and a page and module, or between two categories, or prioritize items on a page, the resource, page (affected categories) and module will be locked for all other users.
- When you create an association between a resource, page, and module, or update the priority of a resource on a page/module, you cannot edit resource properties (label, description, etc.).
- When you edit a category's properties, any associations or prioritizations involving that category will be locked for all other users.
- When you create or reprioritize resource associations on any page and module, the properties and associations for the affected category will be locked for all other users. (For example, Online Services on Resident is being re-prioritized; therefore Resident is locked.)
- If the association of one category to another category above or below (parent or child) is being updated (for example, being reprioritized, or a new association created), you cannot edit category properties.

If categories or resources are being used on multiple sites, locking will occur across site boundaries to protect data integrity.

Important: Because locking can potentially affect many users, it is highly recommended that authors group related tasks (tasks performed to the same page and module, or same area of the website) and quickly move them through the update-generate-preview-deploy process.

Locking will be apparent in a number of ways:

- If a category or resource is locked when you perform a search, that category or resource will appear in the result set with no Edit button next to it. (The Edit button will also not appear if the category or resource was originated on another portal site.)
- If a category or resource becomes locked after you have selected the edit option, but before you click Update, you will receive a message on screen stating that that category or resource is locked by another user. This could happen if another user prioritizes a page/module where the resource is in use while you are trying to update its properties.
- If you try to prioritize items on a page where either a category or resource is locked, there will be no Update button at the bottom of the page. Instead, there will be a message that another user has the page or module locked, and the priority box for specific locked categories or resources will be grayed out.

If a resource or association is being modified in CMA, a CMA lock is applied to that resource or association. A CMA lock prevents authors from updating chunks associated with the locked resource or association. You must either generate all your pending CMA files, or cancel them in order to remove the CMA lock.

When a TeamSite preview lock exists you will not be able to edit the association in CMA. As shown below, when viewing the resource, there will be no option to edit.

When a TeamSite preview lock exists you will not able to re-prioritize the Static Module chunks, avoiding the possibility of putting the wrong version of a feature story on the live production server.

CMA Error Messages

In addition to locking, error handling has been built into CMA to prevent data errors. If an error occurs, an error message is displayed on the CMA screen and no operation will be processed. Table 7 lists and describes the basic error messages.

Table 7. CMA Error Messages

Error Message	Issue
User authentication failure.	The username does not exist in CMA. Secondarily, the user may have switched from working on one website to another without logging out of both TeamSite and CMA. This occurs when the user first attempts to access CMA.
Please enter a label for the category.	User did not enter a required label for the category on the Create or Edit a Category screen.
A category with this label already exists. Please use Find Category from the Main Menu to locate the existing category for re-use.	User attempted to create or update a category with a label that already exists on the Create or Edit a Category screen. Category label must be unique; therefore, if it already exists, it must be found and re-used.
Apostrophe or quotes are not allowed in the Category label.	User entered a category label that included an apostrophe or quotation mark on the Create or Edit a Category screen.
Category description cannot exceed more than 1000 characters.	User entered a category description longer than 1000 characters on the Create or Edit a Navigation Category screen.
Category is currently locked by another author.	Another author is making a change to this category, or to a resource associated to this category.
Please enter a search term.	User clicked Search on a Find Category page without entering a search term.
Please enter a label for this resource.	User did not enter a required label for the resource on the Create or Edit a Content Resource screen.
A resource with this label and path already exists.	User attempted to create or update a resource with a label and path combination that already exists on the Create or Edit a Content Resource screen. The combination of resource label and path must be unique; therefore, if it already exists, it must be found and re-used.
Please enter a File Name for the resource.	User did not enter a path or filename for a resource. (Applies to any type other than Text – Minichunk.)
Path or File Name not found. Please ensure that the file name includes an extension (e.g., .xml).	User did not enter the name of an existing XML file for a resource of type XML, or the name of an existing document (DOC, PDF, PPT, etc.) for a resource of type DOC. The file must already exist in TeamSite before the resource can be created.
Please include the entire path for external links.	User entered a path for an URL – External resource that did not begin with http://, https://, or ftp:// on the Create or Edit a Content Resource screen.
Please enter a Description for the resource.	User has attempted to create a resource of type Minichunk, but has not entered a description.
Resource description cannot exceed more than 1000 characters.	User entered a resource description longer than 1000 characters on the Create or Edit a Content Resource screen.
Expiration date greater than Publication date	User entered an expiration date that is earlier than the entered publication date.
This resource is currently locked by another user.	Another author is making a change to this resource or to a category and/or module to which this resource is associated.

Error Message	Issue
Please enter at least one search criteria.	User did not enter any search criteria on the Find a Content Resource screen before clicking the Search button.
An agency with this Agency Name already exists. (Mass.Gov users only)	User attempted to create or update an agency with a name that already exists on the Add or Edit an Agency screen. Agency name must be unique.
This alternate name already exists for this agency. (Mass.Gov users only)	User attempted to add an alternate agency name that already exists on the Add Alternative Agency Names screen. Agency alternative names must be unique.
Agency is currently locked by another author. (Mass.Gov users only)	Another author is making a change to this agency or another agency on the master list.
Please enter an Agency Name. (Mass.Gov users only)	User did not enter the required agency name on the Add or Edit an Agency screen.
Please enter an Alternate Name for the agency. (Mass.Gov users only)	User did not enter data into the alternate name field on the Add Alternative Agency Names screen.
This association already exists.	User has attempted to associate two categories or a resource to a page and module where the association already exists.
You may not associate a resource to this module at this level.	User has attempted to associate a resource to a page and module where the association is not allowed.
BubbleUp fields cannot be greater than 4.	User has selected more than four items to bubble up when prioritizing a topic page.
Error occurred during content generation. Please try again.	Content generation from the CMA main menu failed.
Error occurred during cancellation. Please try again.	Cancellation of changes from the CMA main menu failed.

Appendix D: Nightly Content Regeneration (CRON) Job

Each night the system kicks off an auto-generation of certain pages to help keep the site fresh and up-to-date. The follow are elements of the nightly job:

Site Map – Regenerated on a nightly basis, rather than each time an author makes a change to the site. If the site map were regenerated each time a change was made, it would likely be almost continuously locked, which could prevent other users from doing their work. It was therefore moved outside of CMA activities and included in the cron job.

Online Services landing page – (Accessed from the More… link in Online Services modules) Regenerated on a nightly basis, rather than each time an author adds or removes a link from the Online Services modules. Similar to the site map, if the page were regenerated on a case-by-case basis, locking could prevent other users from doing their work.

News & Updates modules and landing – Regenerated each night as part of the deferred publishing process. Release of News & Updates headlines is dependent upon publication date and expiration date assigned to the resource in CMA. Headlines included in the nightly generation are those whose publication date is on or before today, and whose expiration date is on or after today. This way, authors can enter headlines one or more days before they are meant to be released to the public, and they will automatically be pushed out during the nightly job.

News & Updates resource disassociations – Each night, all resources associated to News & Updates whose expiration date has passed are disassociated from the module. The resource itself is not deleted. If an author wishes to re-use it, he or she must update its expiration date (to some point in the future) and re-associate it to News & Updates. This part of the cron job helps prevent the CMA prioritize screen for News & Updates from becoming cluttered with out-of-date items. If no expiration date was set, the associations will remain intact unless an author manually disassociates using CMA.

Feature Story – Similar to the News & Updates modules and landing page, the feature story can also be managed through use of publication and expiration dates. Each night, the cron job looks for all feature stories whose publication date is on or before today, and whose expiration date is on or after today. From the matching results, the feature story with the most recent pub date will be displayed. Therefore, several feature stories can be created and associated in advance, and automatically generated and pushed to production on the appropriate day.

Publication and expiration dates currently only have an impact on News & Updates and the Mass.Gov Feature Story modules. Resources associated to other modules will display regardless of publication or expiration dates.
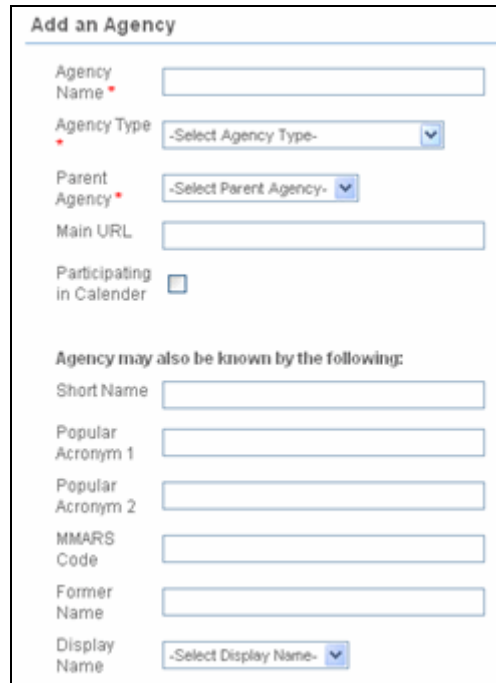
Appendix E: Manage Master Agency List

Note: Since only Mass.Gov users are authorized to use the Create and Find Agency functions, all changes to agency names must be forwarded to Mass.Gov.

The Master Agency List is a shared resource managed currently by Mass.Gov. It includes a comprehensive listing of state agencies, categorized by agency type. Parent-child relationships between agencies are captured in the list under the assumption that each agency will have no more than one parent agency. (Certain agencies may have no parent agency.) In addition, agency name, contact, and location information is captured, as well as whether or not the agency participates in the calendar. The majority of these fields are optional.

The purpose of this master listing is to capture the above mentioned agency information in one place, which can then be repurposed out to multiple uses. Currently, the information in this listing is being used to populate the Branches & Departments topic on Mass.Gov, including the All Agencies Alphabetical List" as well as the Select an Agency Landing page on agency sites. In addition, the Mass.Gov Calendar application uses the list as a reference.

Agencies in the master list are categorized by type. Agency type is based on a fixed list that was determined by the Mass.Gov team. It will rarely, if ever, be changed. Such a change will require administrator involvement. The current agency type list includes the following, and each agency within the Commonwealth should fall under one of these:

- Governor & Executive Departments
- Other Constitutional Officers
- Governors Council
- District Attorneys
- Legislative Branch
- Judicial Branch
- Independent Agencies
- Authorities & Quasi-Public Agencies
- Regional Planning Agencies

Note: Since only Mass.Gov users are authorized to using the Create and Find Agency functions, all changes to agency names must be forwarded to Mass.Gov.

Create or Edit an Agency

Create Agency and Find Agency screens are used to create a new agency or edit the properties of an existing agency. The Create screen is accessed from the main menu by clicking Create Agency. This function can be used when a new agency is created in the Commonwealth or an additional child agency or subdivision is created under an existing agency.

The Edit screen can be reached only after the user locates the desired agency using the Find Agency screen, but otherwise includes all the same fields as the Add an Agency screen. In this case, the input fields will be pre-populated with the properties of the chosen agency.

Figure 45. Add an Agency (Upper Portion of Screen)

Required fields are marked with a red asterisk (*). To create or edit an agency, populate the fields with the following information:

Agency Name: Official name of the agency.

Agency Type: Category within the government structure. Once the type has been selected, the Parent Agency drop-down menu is dynamically populated with all existing agencies of that type, listed in alphabetical order by Agency Name.

Parent Agency: Agency to which this agency reports.

Main URL: URL of the agency home page.

Participating in Calendar: Check box if the agency participates in the Mass.Gov calendar application.

Agency may also be known by the following: Displays a series of fields for entering additional names. These fields are optional, but should be populated if the agency is commonly known by any name(s) other than its official name.

Short Name: Name by which agency is well-known; for example, MassHighway. Limited to 30 characters.

Popular Acronym 1: Abbreviation by which the agency is well-known publicly, often 3 to 6 initials; for example, GOV, ITD, EOHHS, VETERANS, and LOTTERY.

Popular Acronym 2: Another acronym by which the agency is well-known.

MMARS Code: The 3 letter code used by the Office of the State Comptroller for budgetary purposes. The MMARS code of the parent agency should be used if the child agency has no individual code. Leave blank if no MMARS code exists.

Former Name: Previous agency name.

Display Name: Name to be used by applications for display.

Lower portion of screen:

The next block of entry fields relate to agency location and contact information. These fields are optional.

Figure 46. Add an Agency (Lower Portion of Screen)

Agency Building can be filled in if the agency building is known by a proper name. For example, agencies located in One Ashburton Place may choose to type "The McCormack Building" into this field. Additional address and contact fields follow. All should be populated with the main contact information for the agency.

Address fields are used to capture the agency's primary location.

Click Create to add your agency to the master list.

Click Main Menu to cancel the create action and return to the main menu.

Agency Confirmation Screen

The following screen appears when a user clicks Create or Update on the Create or Edit an Agency screens. All fields are displayed in read-only mode, showing user-entered data for verification.

Figure 47. Agency Confirmation

From the Agency Confirmation screen, the Mass.Gov author can:

- Click Main Menu to return to the main menu.
- Click Add Names to enter additional names that may be included in the alphabetical agency listing on Mass.Gov. Name variations enable customers to find an agency more easily.
- Click Edit Agency to return to the edit screen for this agency (if, for example, you notice an error).

Find an Agency

The Mass.Gov author can search for an agency record to either update the record itself or add alternative names for the alphabetical listing.

Figure 48. Find an Agency

Upon first entering this screen, no results will be displayed in the lower half.

The Mass.Gov author can choose one or both of the following search criteria:

- Type search term(s) in the box. Choose Use Wildcard" if only part of the resource name is known, or Use Exact Match if you know the full agency name. By default, search functionality will place a wildcard both before and after the user-entered string.
- Select the type of agency to narrow search results. If selected, only results matching the selection will be displayed.

Click Search to display agencies matching the search criteria. Entries found with a matching string and/or type selection made will be displayed on the lower half of the page: Name, followed by options to Edit or Add Names, which will take the user to the chosen screen.

Click Edit to update the agency's properties, or Add Names to add or update name variations to the alphabetical agency listing page on Mass.Gov.

Click Main Menu to cancel the search action and return to the main menu or click on Create New to add a new agency.
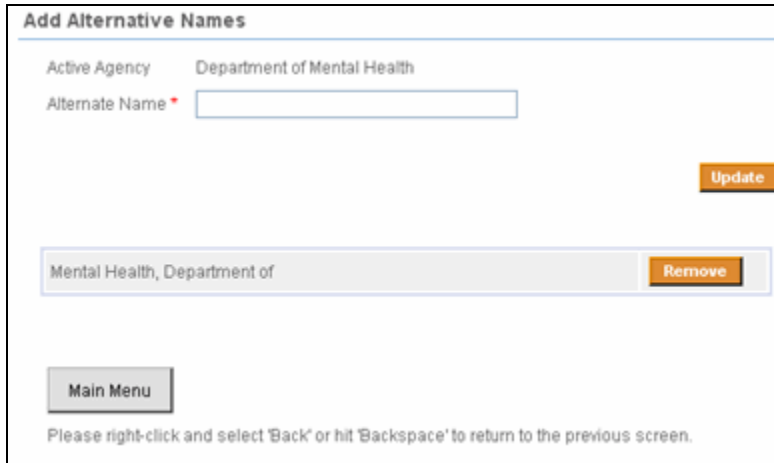
Add Alternative Agency Names

This screen is accessed from the Create or Edit Agency Confirmation Screen, or the Find an Agency screen. It is used to enter variations on an agency name that should be included in the all agency alphabetical listings on Mass.Gov. This is the only place these alternate names are being used. Acronyms and MMARS codes should not be included in this section.

For example, a name variation for the Massachusetts Historical Commission is "Historical Commission, Massachusetts", or, a name variation for the "Department of Education" is "Education, Department of".

All name variations, including the agency's official name, will be included in the All Agency Alphabetical Listing.

Figure 49. Add Alternative Names

Upon entering this screen, any existing additional names entered for an agency will be included in the lower half of the screen. Name variations enable customers to find an agency more easily.

Authors may type in a new Alternate Name and then click update. The page will be refreshed with the new name added to the lower half of the screen.

To remove an alternate name, the author must click the Remove button next to the offending entry. The alternate name will be removed and the page will be refreshed.

To change an alternative name, remove the old, unwanted name, and enter a new one.

Click Main Menu to return to the main menu.

Note: Using the Create Agency function initially places an agency on the alphabetical agency listing page, using the official agency name.

Appendix F: Structural Elements and Standards for Modules

Module Name	Page Location	Page Level	Rank	Status	Label Choices	Letter Case	Max. # of Links Visible on Page
Citizens Alert	Center - top	Home	*	Optional	Appears above Online Services Module – by subscription.	N/A	N/A
Center Content	Center	All	N/A	Required	Category label or Chunk-resource title: Provides primary navigation within the site's hierarchical taxonomy, by links to categories (topics and subtopics) and resources; and displays terminal content (chunks) associated to a category.	Title	Varies (4 to 8 preferred)
Feature Story	Center	Home/ landing	N/A	Optional	Appears below Online Services Module – preferred image should be 122 pixels wide by 80 pixels high. If required a larger image, not to exceed 375 pixels wide may be used.	Sentence	Best Practice 8 to 10 links
Welcome	Left-side	Home	1	Required	Appears on home pages.	Sentence	N/A
Organizational	Left–top	Home/ landing	2	Required	6 label choices: "What We Do," "Select an Agency," "Our Organization," Departments and Divisions," "Programs and Services," "Featured Programs," "Key Agencies," "Our Team," and "Board Members."	Sentence	10 links**
Initiatives	Left-side	Home/ landing	3	Optional	3 label choices: "Initiatives," "Key Initiatives," and "Strategic Initiatives."	Sentence	6 links**
Key Resources	Left-side	Home/ landing	4	Optional	No label choices available; can have description/minichunk.	Sentence	10 links
News & Updates	Right-side	All	1	Optional	No label choices available.	Sentence	6 links**
Weekly / Monthly Archive	Right-side	All	2	Optional	4 label choices: "What's New," "Press Releases," "Management Reports," and "Operational Metrics."	Sentence	5 links**
Online Services	Center/ Right	All	3	Optional	No label choices available. (appears right at lower levels).	Sentence	16 links home/5 lower levels**

Module Name	Page Location	Page Level	Rank	Status	Label Choices	Letter Case	Max. # of Links Visible on Page
Documents	Right-side	All	4	Optional	5 label choices: "Data & Statistics," "Publications," "Publications & Reports," "Research & Statistics," and "Forms & Publications."	Sentence	6 links**
Related Links	Right-side	All	5	Optional	4 label choices: "Related Links," "Featured Links," "Quick Links," and "Hot Topics."	Sentence	5 links**
Static Image	Left/Right-side	Home/ landing	*	Optional	Image module used as a link to a corresponding page. Image Size: LG=158x124, Med=158x74,Sm= 158x54.	N/A	1 link

* These modules are not standard and, if the EO/Agency would like them for their home page, a request must be put into Mass.Gov (via E2E – 1 week lead)

** If the number of links exceeds the module's maximum, a More… hyperlink automatically appears. Clicking the More… link directs the user to a page that lists all the links.