Standard CMS Training Sessions

BASIC TRAINING

Summary

This is a foundational course that covers the fundamentals of the content management system (CMS) user interface and how to edit content on the website.

Target Audience

All users

Duration

3 hours

Agenda

1. Logging in, changing your password, forgot password
2. Dashboard and Bookmarks
3. Workflow and content reports
4. Creating and Editing Pages
   a. Page Tree
   b. Page Details
      i. Content Groups
      ii. Page Templates
   c. Page Design
      i. Editing Widgets
      ii. WSYSIWYG Editor
         1. Headings
         2. Internal Links
         3. External Links
         4. Documents
         5. Images
         6. Tables
         7. HTML View
   d. Save. Publish.
   e. Page Details Plus
      i. Redirect URL
   f. Moving Pages
5. Component Introduction

6. Uploading Images & Documents
   a. Folders
   b. Allowed file types
   c. Maximum file size
   d. Replacing files
7. Creating Events or News (Choose 1)
   a. Content Groups
   b. Typical fields (Title, Date, Details, etc.)
   c. Categories
   d. Display on Homepage
   e. eNotifications
   f. Make Recurring (Events only)
8. Displaying Events/News on a page

BEYOND THE BASICS TRAINING

Summary

This is an advanced course that covers additional CMS Components and Widgets to enable content editors to take their pages to the next level.

Target Audience

Content editors that wish to become power users

Prerequisite

Basic Training

Scheduling

- It is recommended that Basic Training and Beyond the Basics do not occur on the same day. Users should practice the skills learned in Basic Training prior to attending Beyond the Basics.
- It is recommended that Super User Training is completed prior to Beyond the Basics to facilitate some administrative prep work that may be needed.

Duration

3 hours

Agenda

1. Page template theory (how page templates work and what they're capable of doing)
   a. Six basic layouts

       b. Widget types
          i. List
          ii. Box
          iii. Content Formatting
          iv. Page Features
2. FAQs
       a. Creating/Editing
       b. Ranking
       c. Widgets and Widget settings
3. Forms
       a. Form Details
          i. Content Groups
          ii. Security
          iii. Submission
          iv. Notifications
       b. Form Design
          i. Field types
          ii. Pages
          iii. Branching and Conditional Logic
       c. Widgets and Widget settings
4. Content Formatting Widgets
       a. Accordion
       b. Content Columns
       c. Spotlight
       d. Tabbed
       e. Testimonial
5. Advanced Page options
       a. Copying Pages
       b. Swap Page Template
       c. Connected Pages
6. Client-request topics

SUPER USER TRAINING

Summary

This is an advanced course that covers administrative functions within the CMS.

Target Audience

Website administrators/web masters

Prerequisite

Basic Training

Duration

2 hours

Agenda

1. Managing the Homepage and Custom Content
2. Page Templates
3. System Variables
4. Splash Page Manager
5. Friendly URL Redirect
6. Administration Reports & Log In History
7. Departments
8. Social Media Accounts
9. Trash Can
10. Content Permissions
    a. Configuring Users
    b. Content Groups
    c. Workflows
    d. Content Roles
11. Administrative Permissions
    a. Security Roles