



November 2023

Training Tuesday

Strategies for Training Your Editors

Presented by:

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Agenda

- Planning and Prep
- Training Resources and Materials
- Post-Training Resources and Materials

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Planning and Prep

- If you are a new customer, training should occur after all UAT is completed
- Training goal: A day in the life of an editor
 - From login to logout, what will your typical editor be doing within CMS?
 - If you have editors of different levels, plan for each level separately.
- Hands-on activity-based training
 - This will mean your training session will take more time
- There is SO MUCH you can do in CMS. Don't plan on showing them everything! Only include the necessary tasks so they can do their jobs.

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Planning and Prep

- Identify the pages/templates to be included in training
 - Which pages/templates will they be editing on a regular basis?
 - Do you need to show all pages/templates?
 - Is the editing experience the same on each? Or is there something new, (e.g. multiedit)?

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Planning and Prep

- Identify the editing tasks to be included in training
 - Will they be...
 - Editing using editable regions?
 - Inserting images/links?
 - Submitting pages for approval?
 - Editing navigation or props files?
 - Uploading images/files?
 - Creating new content? (level 4 and above)
 - Editing page parameters? (level 5 and above)
- Identify specific snippets/assets/components they will commonly use
- Identify ones that are complex and need explaining

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Planning and Prep

- Build out a training outline
- Do a run through of the training tasks
- Multiply the time by 1.5x or 2x to account for hands-on activities and Q&A
- Schedule your sessions
 - If you have editors of different levels, try to group similar levels into a single session.
 - If that's not possible, try doing overlapping tasks at the beginning and then dismissing the lower-level editors to focus on higher level tasks.

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Planning and Prep

- Create users for all editors
 - Create a couple of extra users just in case
- Set access restrictions as appropriate
 - Site Access
 - Section Access
- Instruct your editors to login before the training session

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Training Resources and Materials

- Prep the Training Environment
 - Create a separate training section
- Training Page(s)
 - Add training text to each page
 - Each editor needs their own page
 - Create a couple of extra pages, just in case
- Images/Documents Folders
 - Have sample images/documents uploaded
 - Set the Default Image Folder directory variable
- Publish the entire section
- Set Template Groups if necessary
- Create a training user (same level as your editors)
- Do a run through of the training tasks as the training user

Training Resources and Materials

- Create a Training Presentation Deck
 - If you are a new customer, highlight differences between your old CMS and Modern Campus CMS
 - Check-in/Check-out
 - DirectEdit Link
 - Provide URL to training page
 - For example: https://mwhite.oudemo.com/_training/interior-page-#.html

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Bonus: Training Tips

- Assign numbers to each computer station
- Have everyone use the same browser
- Have a knowledgeable helper
- Login as the training user (same level as your editors)
- Zoom in on your screen
- Limit navigating between different tabs
- Talk through every mouse-over and click
- Increase the size of any source code

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Post-Training Resources and Materials

- Create an editing guide
 - Step-by-step instructions for all tasks reviewed during training
 - Include screenshots from inside CMS
 - Upload the guide into CMS, publish, and set it as an Add-on
- Create a style guide
 - Instructions on how pages should be built out (e.g. when to use snippets)
 - Guidelines on writing for the web
 - Include branding specifics (e.g. font family, colors, logos)
- Utilize the Support Site

Bonus: Post-training Tips

- Leave the Training Section live so your editors have an environment to test their skills
- Have your editors start using CMS immediately after training so newly developed skills don't get stale
- Schedule “working sessions” where editors can work in a space with you

QUESTIONS?



The Modern Campus Advantage **Starts Here**



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Pathways[®]

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Thank You!

The next Training Tuesday will be on **January 30, 2024**.

Check back on our support page for the topic and to register!

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