# New Hire CMS Training Outline

## Topics

* Anatomy of a typical client homepage
* Admin login
  + Front end vs. Back end
  + Dashboard, Toolbar
* Workflows and Approval Cycles I
  + Basic concept (“Published” state vs. other states)
  + Super users vs. approvers vs. editors
    - (vs. webmaster vs. SysAdmin)
* Core components
  + Pages I
    - Page tree structure
    - Review vs. Edit
    - WYSIWYG editor
      * Internal Links
    - “Show All Options” bar
    - Edit Mobile
  + Image Library / Document Central
  + ***Scenario 1***
  + Pages II
    - Review Scenario 1
    - Redirect links
    - Connect
    - Move, Delete
  + News / Events
  + ***Scenarios 2 and 3***
  + Page widgets
  + Categories / Departments
  + Page widget settings
  + ***Scenario 4***
* Advanced components I
  + eNotification
  + Extranet
* CMS Users vs. Website Users
* Workflows and Approval Cycles II
  + Publish vs. Approve
    - vs. Reject
  + Save vs. Approve
  + Archive
  + Awaiting My Approval
  + Locked content
  + Best practices
    - Review rather than Edit whenever possible
    - Unlock all content when done editing (especially on live site)
* Help 🡪 Online Reference
* Page Templates
* Advanced components II
  + Job Posts / RFP Posts
  + Staff Directory / Business Directory / Facility Directory / Service Directory
  + Service Requests
  + Forms & Surveys
* Site Settings
  + Trash Can
  + Friendly URL
  + Custom Content
  + System Variables
  + Refresh Headers and Footers
* Workflows and Approval Cycles III
  + How to set up a new Content Group, Content Role, and Workflow
* Advanced components III
  + Event Registration
  + Facility Reservations
  + Social RSS Feeds
  + Others as relevant

## Example Scenarios

### Scenario 1: Page

1. Create a page for the “Parks and Recreation” department / content group
2. In the content area, embed at least one image which you upload into the CMS
3. In the content area, embed at least one image already existing in the CMS
4. In the content area, link to at least one document which you upload into the CMS
5. Hide the page from dropdown navigation, but allow any user with the link to view it

### Scenario 2: News

1. Create a news item for “Parks and Recreation”
2. Include intro text
3. Include a thumbnail image
4. Embed at least one image and link at least one document
5. Make the news item display on the homepage
6. Make the news item expire tomorrow

### Scenario 3: Event

1. Create an event for “Parks and Recreation”
2. Make it this weekend
3. Include an address and an event cost
4. Include at least one embedded image and at least one document link
5. Make the event display on the homepage

### Scenario 4: Department Homepage

1. Swap the page template of the page from Scenario 1 to include the following common Department Homepage widgets:
   1. News box
   2. Event box
   3. Image rotate
2. Make the page a Department Homepage
3. Set a banner image rotation for Parks and Recreation
4. Embed at least one image and link at least one document
5. Make the news item from Scenario 2 display in the news box
6. Link the news box “more” link to the site’s main news list page
7. Make the event from Scenario 3 display in the event box
8. Link the event box “more” link to the site’s main calendar page
9. Order the mobile view of the page to display the following widgets in this order:
   1. Image rotate
   2. Content area
   3. News box
   4. Event box
   5. Side Navigation Menu
10. Save an archive of the page

Reinforce to trainee:

* “Swap Page Template” erases page content
* Category and Department constraint logic
  + unchecked vs. check all
  + exclude vs. include
  + best practice: constrain only Category *or* Department, not both

### Scenario 5: Friendly URL

1. Create a friendly URL

### Scenario 6: eNotification

1. Send yourself a manual eNotification

### Scenario x: Service Request

1. Submit a service request
2. Respond to a service request

### Scenario x: Form Tool

1. Create a form
2. Submit to the form
3. Track results of the form