OmniUpdate Training Tuesday
Strategies for Training Your Editors

Zoom Event # 255-546-486

Audio will be heard on your computer speakers.

If you do not have working computer speakers, call 1-408-792-6300. Enter event number and attendee ID or press # if no attendee ID.

Presented By: Barbara McQuillan Training Supervisor

Webcast will start at the top of the hour.
▪ Planning and Prep
▪ Training Resources and Materials
▪ Post-Training Resources and Materials
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 OU Campus?
- 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 OU Campus. Don’t plan on showing them everything! Only include the necessary tasks so they can do their jobs.
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)?
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?
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.
PLANNING AND PREP

- Create OU Campus users for all editors
  - Create a couple of extra users just in case
- Set access restrictions as appropriate
  - Site Access
  - Section Access
- Have your editors login before your training session
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 OU Campus
    - Check-in/Check-out
    - DirectEdit Link
  - Provide URL to training page

https://bmcquillan.oudemo.com/_training/interior-page-#.html
▪ 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
POST-TRAINING RESOURCES AND MATERIALS

- Create an editing guide
  - Step-by-step instructions for all tasks reviewed during training
  - Include screenshots from inside OU Campus
  - Upload the guide into OU Campus, 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)
BONUS: POST-TRAINING TIPS

- Leave the Training Section live so your editors have an environment to test their skills
- Have your editors start using OU Campus immediately after training so newly developed skills don’t get stale
- Schedule “working sessions” where editors can work in a space with you
Next month’s Training Tuesday will be held on **SEPTEMBER 24TH.**

We’ll be covering the topic of **SUPPORTING YOUR EDITORS WITH DOCUMENTATION.**

Be sure to visit the OCN or Support Site for further details!

http://ocn.omniupdate.com  
http://support.omniupdate.com
Thank you!