

**We Created a CMS Training Course in Six Easy Steps. You Won't Believe What Happens Next!**

# What to expect today

## First half: training overview and examples

- Traditional Content Management System (CMS) training
- Online CMS training options
  - Free vs. Paid online CMS training
  - Making your own online CMS training
- Learn what VU Digital discovered creating our own CMS 101 course

## Second half: Online training framework

- Guidelines for creating an online CMS training
- Slides will be posted at the end





# About Me

Kevin Webb

Web developer at Vanderbilt University

11 years at VU

Nashville, TN

Lead our CMS 101 training course initiative



# About Vanderbilt Digital

- Part of Division of Communications
- Web development and design for the university
- Centralized website support division
- Decentralized content editing model
- The CMS training we offer is done by our developers (no full time e-learning staff)
- Our office is not an e-learning specialist. Just creating CMS training materials as needed for our division



# About Vanderbilt Digital

- 8000: registered CMS users (OmniUpdate and WordPress)
- 2200: websites (VU online since 1994)
- 10: Staff

## Support methods

- Online CMS training
- Online documentation
- Office hours (2/weekly)
- Help desk tickets



# Help desk stats

## September

2011: 47

2012: 66

2013: 212

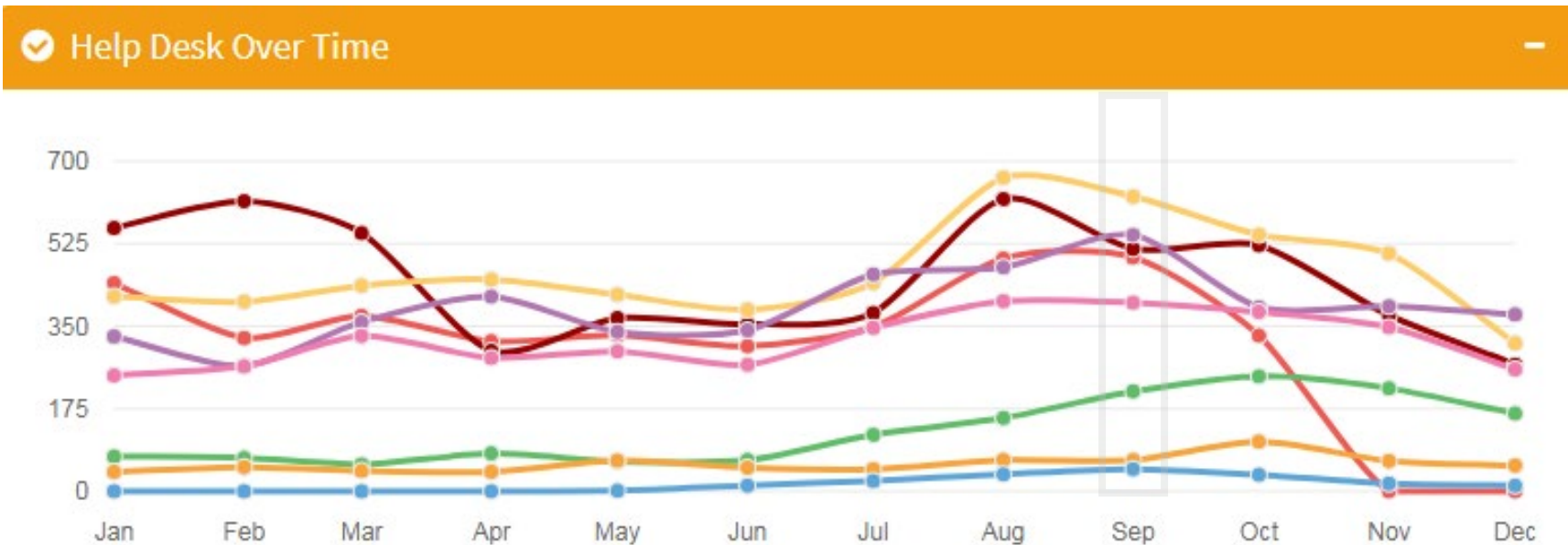
2014: 400

2015: 544

2016: 625

2017: 514

2018: 496



# Traditional CMS Training

- Classroom style
- Typically done in person
- 1:1 setting or group classes
- Our method until March 2015



# Why offer CMS training?

- Empower faculty and staff to use the CMS
- Increase user base
- Don't break anything





# Online CMS training

- Convenient
- Learners don't have to go to you
- Staff don't travel to train (also helps as user base scales)
- Learners study at their own **pace** and **schedule**



Image credit: <https://www.vecteezy.com/>



# Online CMS Training options – Free and purchased





Extensive training collection  
High quality materials  
\$Cost



Extensive training collection  
High quality materials  
\$Cost



\$Free (ad supported)  
Variable content quality  
Lots of topics to choose from  
Platform changes influencing content creators



# Online CMS Training – Making your own



Image credit: <https://www.vecteezy.com/>

## Advantages

- University branding and terminology
- Tailor training to your needs
- Control over topics/tech covered
- Less expensive
- Own the media files

## Disadvantages

- You are creating all the material
- Can take a lot of time to create
- You will need to fix/amend if there are changes to address



# Why we made our own online CMS training

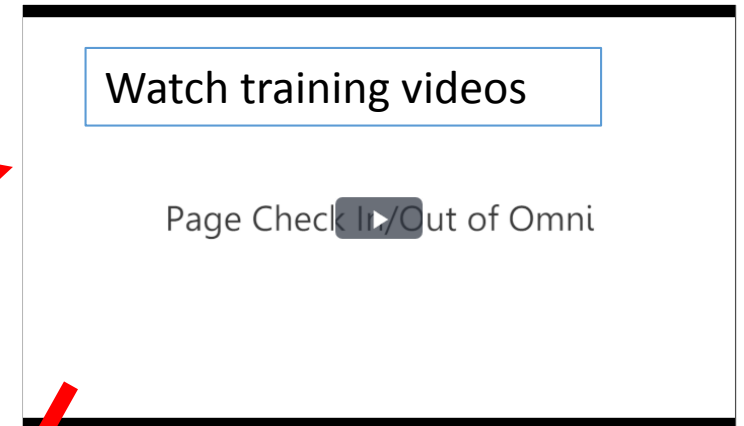
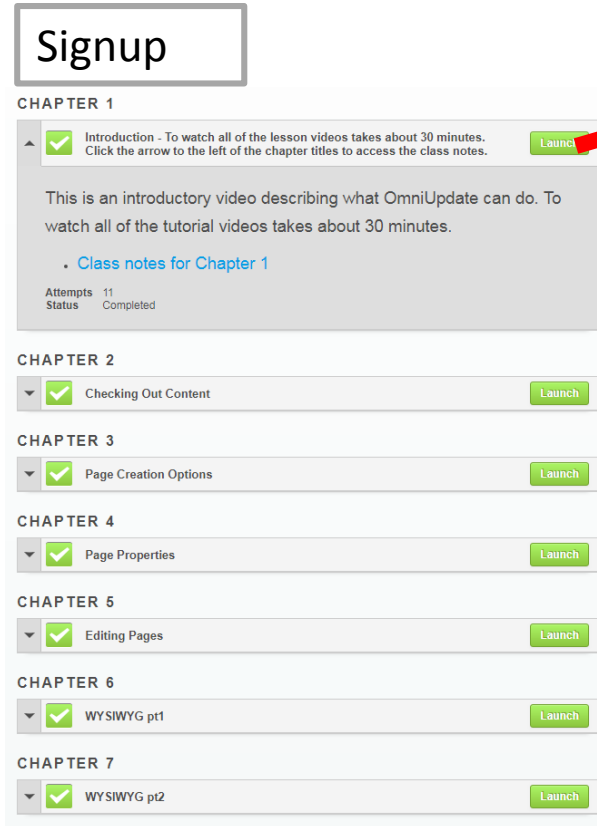


- Learning materials didn't exist yet for our OU 10
- Training a large user base (~800 registered users)
- Get existing users up to speed. Plan for new users
- Customer demand (online CMS training)
- Vanderbilt branding
- Vanderbilt visual styling (website theme)
- Tailored to our OmniUpdate configuration

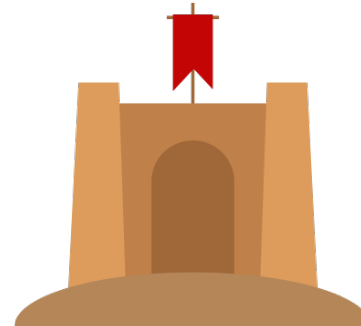




# What we made: Omni 101



Request access to Sandbox



Complete exercises in sandbox environment

Request exercise review and access to departmental website

Image credit: <https://www.vecteezy.com/>



VANDERBILT UNIVERSITY

# Omni 101 notes

- Launched March of 2015
- 10 video modules (5min or less each)
- Practice exercises (basic page editing)
- Took about 4 months to create (not full time effort)
- Since launch 280 **new** users trained
  - On track to have over 300 trained by year end
  - Average ~100 new users a year
- Working on Omni 101 v2



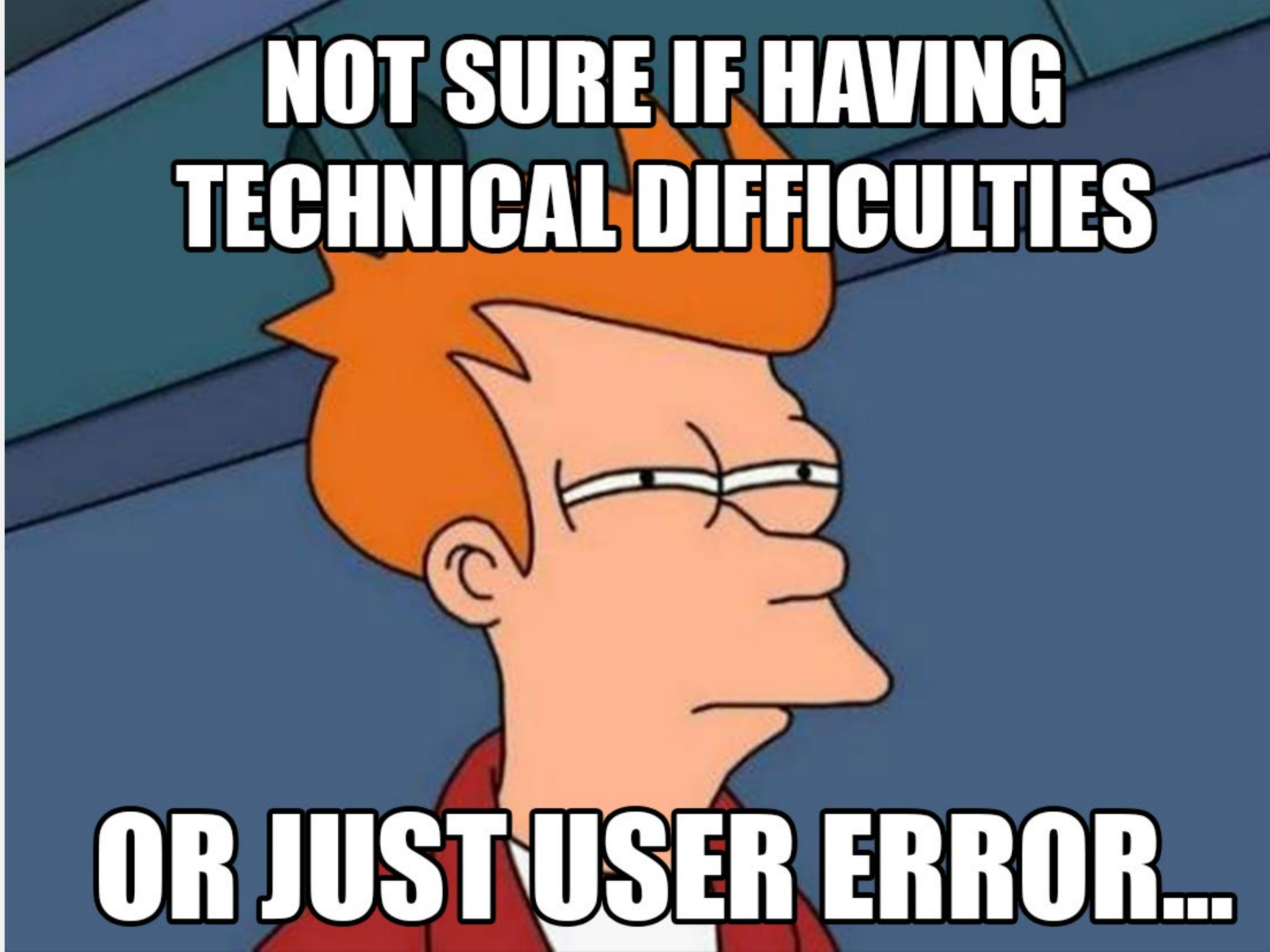
# What we learned

- Users *love* training (ha ha – no... But people are learning!)
- Help tickets didn't go down dramatically
- Better user questions after training
- Online CMS training isn't going to put us out of work.  
Users still need help
- Some people actually do work on their own
- Keep it short
- Know your primary audience
- Have online written reference to support training



**NOT SURE IF HAVING  
TECHNICAL DIFFICULTIES**

**OR JUST USER ERROR...**



# Creating your own online CMS training

1. Write Brainstorm/Outline/script
2. Record video
3. Documentation
4. Upload
5. Beta Test
6. Launch and distribute





# 1: Write!

## Brainstorm

- Including basic steps to get work done
- Users learn how to log in, edit, save and publish
- Ask users to complete a quiz at the end

## Outline

- How to log in
- How to edit a page
- How to save
- How to publish

## Script

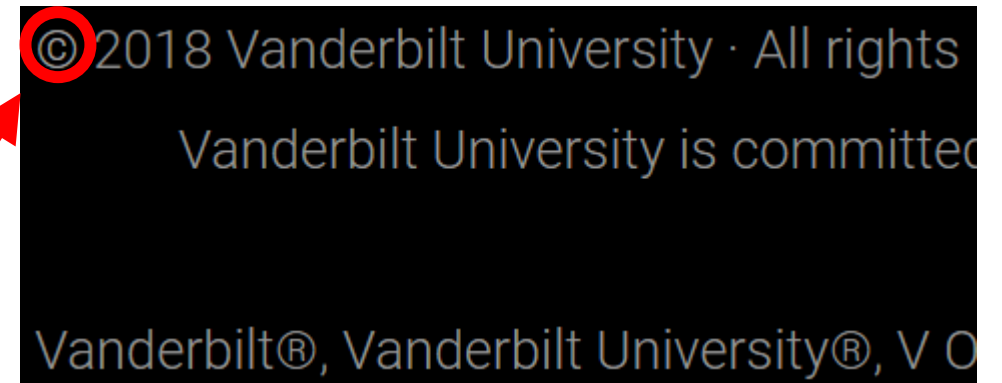
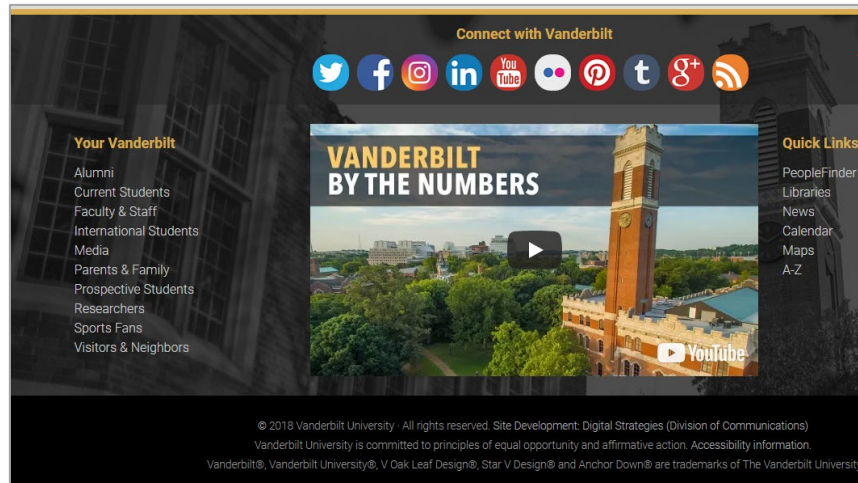
- In the first step, you log in by...



- Limit scope
- Use brief concise language
- A full training course is just a collection of smaller lessons

### How to log into OmniUpdate at VU

- Scroll to the bottom of the page
- Click on the copyright symbol (©) in the footer
- Enter your VUnetID and ePassword

A screenshot of the Vanderbilt University "Sign On" page. The header features the "VANDERBILT UNIVERSITY" logo. Below the header is a "Sign On" section with the text "Please sign on and we'll send you right along." It contains two input fields: "Username" and "Password". At the bottom of the form are three buttons: a red "Ping family" button, a blue "Cancel" button, and a green "Sign On" button. A red arrow points from the copyright symbol in the previous image to the "Sign On" button.

## 2: Record!



Camtasia



Captivate



Screenflow

- Use a screen recording program (Captivate, Camtasia, Screenflow)
- Keep it short
  - 5 min or less for individual lessons
  - 15-20 min or less for an overview video
- Use bullet points rather than a script if that works for you
- Be professional, but try to be conversational when possible.
- A link to how-to tutorials posted at the end of this presentation



# Record! – Audio Editors



Adobe Audition



- Audio editors let you tweak the sound
- You can record your walkthrough audio separately

# Basic Tools



Samson Go Mic





# Upgrades



Adobe Premiere



Adobe Audition



Blue Yeti  
Microphone



# Audio and Video tips

- MP4
- Create/export video to at least 720p video (HD)
- Avoid fancy video transitions (bounce, spin, swirl)
- Freeze frame to give more time to talk about a step
- Compress video output (if possible under 1 GB)
- Stream video. Don't make users download huge MP4 files (use a streaming server, YouTube or Vimeo)



# 3: Writing Documentation

- Double check your info in the vendor documentation if you are unsure about a step or process
- Use your notes from script
- More formal than the screencast
- Provide the steps needed assuming the user didn't watch the video
- Add screenshots where needed
- Keep steps short and easy to read (Hemingway writer)
- <http://www.hemingwayapp.com/>



Image credit: <https://www.vecteezy.com/>



# 4: Upload

- Create web pages for the exercises, tutorials and documentation
- Upload media files (images, pdfs, ect)
- Upload video files (MP4)
- If upload to Youtube and embed, disable recommended videos when you generate code.

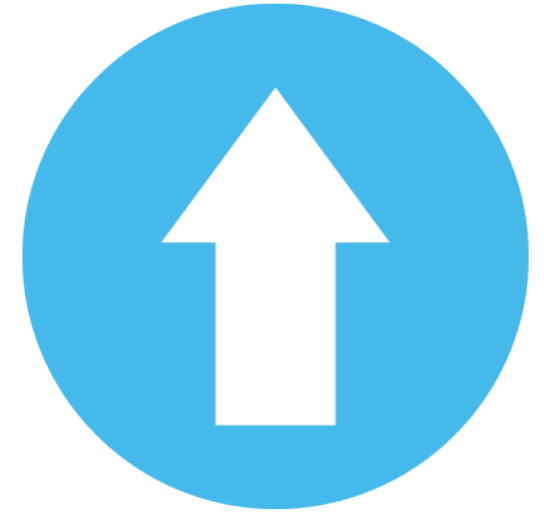


Image credit: <https://www.vecteezy.com/>

EMBED OPTIONS

☐ Show suggested videos when the video finishes.

☒ Show player controls.

☒ Show video title and player actions.



# 5: Beta test

- Have users go through your training
- Test users who aren't in your department and don't know the technology
- Do users consistently miss a step or concept?
- Do users have complaints or suggestions?
- Review and revise based on feedback

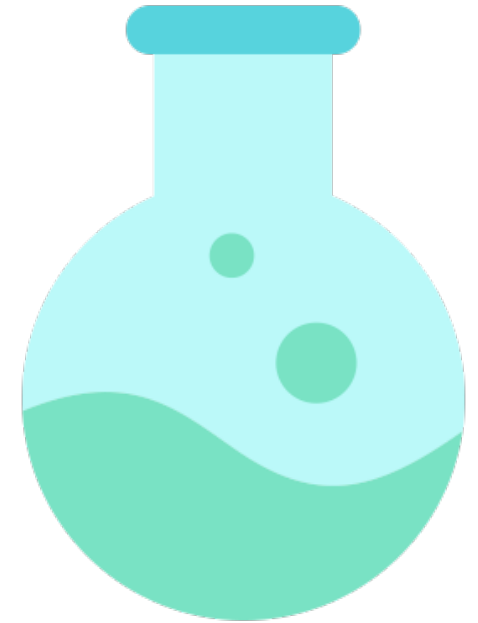


Image credit: <https://www.vecteezy.com/>





# 6: Launch

- Post to your news, social media and mailing lists
- Keep looking user feedback. Can training be improved?
- Refer users to your training materials when they ask questions

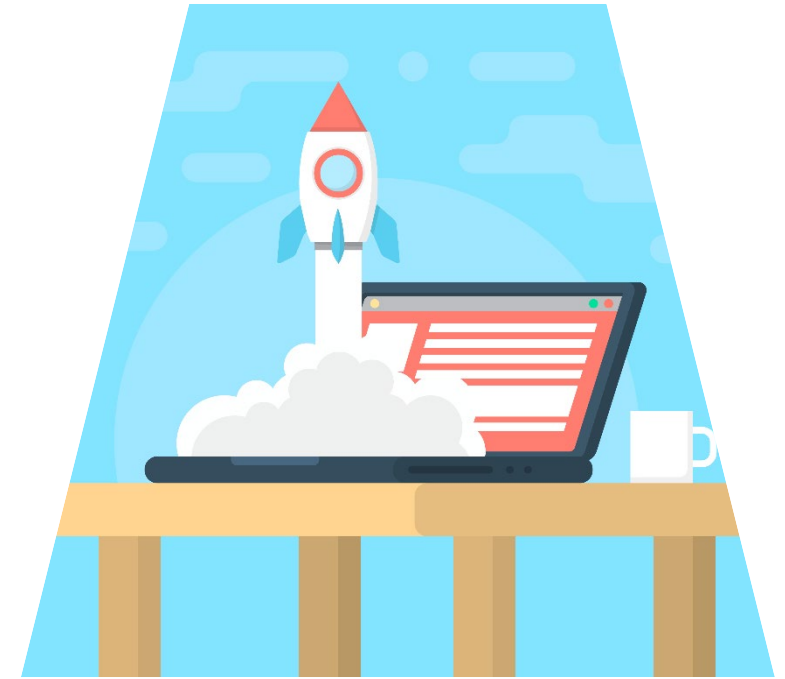
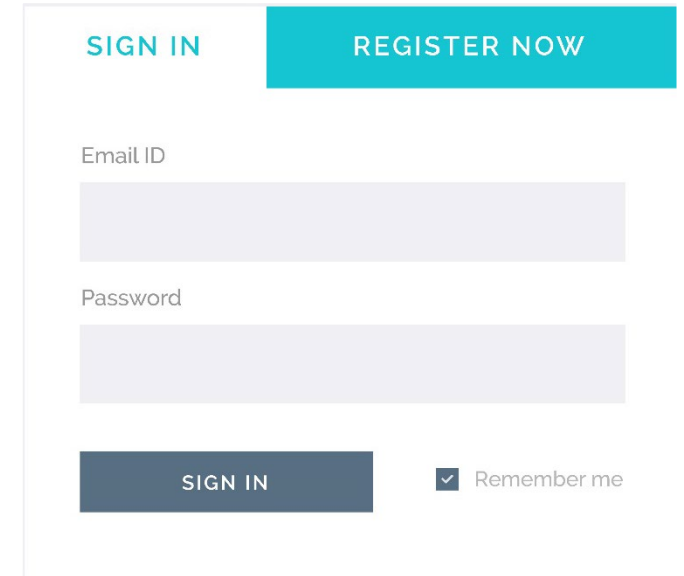


Image credit: <https://www.vecteezy.com/>



# 6a: Signup method (optional)

- Typically for restricted environment (LMS, secured web pages, etc.)
- Sign up via help desk ticketing system
- Other form options: (Typeform or Google Forms)
- Increase participation
  - Online quizzes (Survey Monkey or Typeform)
  - Require test exercises to be completed before site access is granted



SIGN IN REGISTER NOW

Email ID

Password

SIGN IN ☒ Remember me

Image credit: <https://www.vecteezy.com/>



# Thank you!

Kevin Webb

Web Developer, Vanderbilt University

[Kevin.Webb@Vanderbilt.edu](mailto:Kevin.Webb@Vanderbilt.edu)

<https://my.vanderbilt.edu/cms-training-course/>

