# CFWNC Website Training Plans

These training sessions should be about 45 minutes to an hour in the Finance Conference Room. Before each training, the Website Administrator should set up the trainee's website login and set their permissions in the backend of Craft.

## Program

1. Show the CFWNC homepage on the big screen (Point out the sections the trainee will edit, so Grants, Students, and Initiatives pages)
2. Show how to login to the backend of the website using cfwnc.org/admin (Bookmark this since it will drop the user right into the backend)
   - Introduce the layout of backend (Entries and Asset navigation)
   - Show the pages the trainee will edit in the backend. Point out the Section Title, that they do not edit, only content.
     - Briefly explain different block types (Text & Image, Text & Accordion, etc.)
     - Show how to make changes to a page and how to save both the block AND the entry, then how to preview the page to see if changes took
     - Since Program has access to edit Accordions, show how to do this (Accordions are on most of the Focus Area pages, and on the Nonprofit Resources page)
   - Explain the Asset folder structure for Documents (Ex: If you are inserting/replacing a document on a grant program page, make sure the document is uploaded to the Assets>Documents>Grants folder)
3. Establish login for trainee– send the Forgot Password link or have them go to cfwnc.org/admin and click "Forgot password"
4. Have the trainee plug their laptop into the display and practice editing. Use this time to check for access.
   - Since Program uploads documents, mention naming conventions (version the document and have the date it was last updated somewhere within the document)
   - For Grants Directory practice, Program trainee will upload "LEARNING LINKS DOCUMENT TESTING" PDF from Communications>Web> Website Documentation to the correct folder (Assets>Documents>Grants), then link it to "Recent Grants" in the "Additional Information" block of the Learning Links page
   - For Affiliates practice, Program trainee will upload "MITC GRANT HISTORY TESTING DOCUMENT" from Communications>Web>Website Documentation to the correct folder (Assets>Documents>Affiliates>Mitchell), then link it to the "Download grant history" text in the teaser on the MITC Recent Grants page
   - For Scholarship Directory practice, Program trainee will upload "COUNSELOR INSTRUCTIONS DOCUMENT TESTING" PDF from Communications>Web>Website Documentation to the correct folder (Assets>Documents>Students), then link it to the "For School Counselors" block of the School Resources & Scholarship Deadlines page

- - o Can also practice editing Accordions or text in blocks as needed, remembering to double save!
5. Discuss the Standalone page for Program, which is used for creating public facing links that aren't indexable and can't be Googled. (This may be something that requires further training later in the onboarding process)
    - o When a Program form is updated and needs to be relinked to GLM, upload the new form to Assets>Documents>Standalone>Program (version the document and have the date it was last updated somewhere within the document)
    - o Go to Entries>Standalone Pages>Program Form and relink
    - o Go to View>Primary Entry page at the top and right-click the link you need to grab. Select "Copy link address" and paste into GLM
    - o ALWAYS test this to be sure the newest version of the form is now appearing in GLM
6. Questions?
7. Make sure the trainee is clear that they only edit content (text, images, or documents) when asked to do so, and any major design changes need to go through the Communications Director, including enabling/disabling blocks.
8. Share "File Upload Tips" PDF and "Directory Tips for Program" PDF with the trainee and show them how to get to Design Standards in the backend or bookmark it

## Finance

1. Show the CFWNC homepage on the big screen (Point out the sections the trainee will edit, so Giving>Investments and Financial Info page; Mention how the About>Investments and Financial Info page redirects to this one)
2. Show how to login to the backend of the website using cfwnc.org/admin (Bookmark this since it will drop the user right into the backend)
    - o Introduce the layout of backend (Entries and Asset navigation)
    - o Show the pages the trainee will edit in the backend. Point out the Section Title, that they do not edit, only content.
        - ▪ Briefly explain different block types (Text & Image, Text & Accordion, etc.)
        - ▪ Show how to make changes to a page and how to save both the block AND the entry, then how to preview the page to see if changes took
        - ▪ Since Finance has access to edit Accordions, show how to do this on the Investments & Financial Information page
    - o Explain the Asset folder structure for Documents (Ex: If you are inserting/replacing a document on the Investments & Financial Information page, make sure the document is uploaded to the Assets>Documents>Giving folder)
3. Establish login for trainee– send the Forgot Password link or have them go to cfwnc.org/admin and click "Forgot password"
4. Have the trainee plug their laptop into the display and practice editing. Use this time to check for access.

- o Since Finance uploads documents, mention naming conventions (version the document and have the date it was last updated somewhere within the document)
        - o For practice, Finance trainee will upload "AUDITED FINANCIAL STATEMENTS DOCUMENT TESTING" PDF from Communications>Web>Website Documentation to the correct folder (Assets>Documents>Giving), then link it to "Fiscal Year 20XX" in the "Investment Approach" accordion block of the Investments & Financial Information page
        - o Can also practice editing Accordions or text in blocks as needed, remembering to double save!
    5. Questions?
    6. Make sure the trainee is clear that they only edit content (text, images, or documents) when asked to do so, and any major design changes need to go through the Communications Director, including enabling/disabling blocks.
    7. Share "File Upload Tips" PDF with the trainee and show them how to get to Design Standards in the backend or bookmark it

## Development

1. Show the CFWNC homepage on the big screen (Point out the sections the trainee will edit, so Giving, Professional Advisors, and Affiliates pages)
    - o Note that the Development Associate has Admin access for the Affiliates, meaning they can add users and create entries in Affiliates, so this may be something that requires further training later in the onboarding process
2. Show how to login to the backend of the website using cfwnc.org/admin (Bookmark this since it will drop the user right into the backend)
    - o Introduce the layout of backend (Entries and Asset navigation)
    - o Show the pages the trainee will edit in the backend. Point out the Section Title, that they do not edit, only content.
        - ▪ Briefly explain different block types (Text & Image, Text & Accordion, etc.)
        - ▪ Show how to make changes to a page and how to save both the block AND the entry, then how to preview the page to see if changes took
        - ▪ Since Development Officer has access to Call-to-Actions, show how to edit this (Call-to-Actions are on most of the "Create a Fund" subpages, and they are also sprinkled around the website for who to contact at CFWNC)
    - o Explain the Asset folder structure for Documents (Ex: If you are inserting/replacing a document on the "Create a Fund" page, make sure the document is uploaded to the Assets>Documents>Giving folder)
3. Establish login for trainee– send the Forgot Password link or have them go to cfwnc.org/admin and click "Forgot password"
4. Have the trainee plug their laptop into the display and practice editing. Use this time to check for access.

- Since Development uploads documents, mention naming conventions (version the document and have the date it was last updated somewhere within the document)
- Development Officer trainee will upload "UNRESTRICTED FUNDS DOCUMENT TESTING" from Communications>Web>Website Documentation to the correct folder (Assets>Documents>Giving), then link it to the Unrestricted Funds page (This is a call-to-action block)
- Development Associate trainee will upload "MITC test image" from Communications>Web>Website Documentation to the correct folder (Asset>Images>Affiliates>Mitchell), then add it to "Creating a lasting resource" block on the MITC Homepage
- Development Associate trainee will upload "MITC GRANT HISTORY TESTING DOCUMENT" from Communications>Web>Website Documentation to the correct folder (Assets>Documents>Affiliates>Mitchell), then link it to the "Download grant history" text in the teaser on the MITC Recent Grants page (I believe this is now edited by the Program Associate, but keeping it here in case practice is needed with uploading a document)
  - Show the Development Associate trainee how to find the MITC Secure Advisory Board Portal in the backend
  - For Secure page practice: Development Associate trainee will upload "MITC GRANT HISTORY TESTING DOCUMENT" from Communications>Web>Website Documentation to the correct folder (Assets>Locked>Affiliates>ZFund-StatementsGift-Reports), then link it to the "[Contributions] Cumulative Gift Report FY 20XX-20XX" block on the MITC Secure Advisory Board Portal in the backend
- Development Associate trainee will also be responsible for updating Affiliate internal and external forms as needed, so this may be something that requires further training later in the onboarding process. Consult the "Website Forms Tips" PDF.
- Can also practice editing other Call-to-Action blocks text in blocks as needed, remembering to double save!

5. Questions?
6. Make sure the trainee is clear that they only edit content (text, images, or documents) when asked to do so, and any major design changes need to go through the Communications Director, including enabling/disabling blocks.
7. Share "File Upload Tips" PDF with the trainee and show them how to get to Design Standards in the backend or bookmark it

## Donor Relations
1. Show the CFWNC homepage on the big screen (Point out the sections the trainee will edit, so Giving>Donor Relations page)
2. Show how to login to the backend of the website using cfwnc.org/admin (Bookmark this since it will drop the user right into the backend)

- o Introduce the layout of backend (Entries and Asset navigation)
- o Show the pages the trainee will edit in the backend. Point out the Section Title, that they do not edit, only content.
  - ▪ Briefly explain different block types (Text & Image, Text & Accordion, etc.)
  - ▪ Show how to make changes to a page and how to save both the block AND the entry, then how to preview the page to see if changes took
  - ▪ Since Donor Relations has access to Accordions and Call-to-Actions, show how to edit these (Call-to-Actions are on the Donor Relations page and the Standalone page for Co-investment, and an accordion is on the Standalone page for Co-investment)
- o Explain the Asset folder structure for Images and Documents (Ex: If you are inserting/replacing an image/document on the "Donor Relations" page, make sure the image/document is uploaded to the Assets>Images>Giving folder or Assets>Documents>Giving folder)

3. Establish login for trainee– send the Forgot Password link or have them go to cfwnc.org/admin and click "Forgot password"
4. Have the trainee plug their laptop into the display and practice editing. Use this time to check for access.
   - o Donor Relations trainee will upload "DR TEST IMAGE" from Communications>Web>Website Documentation to the correct folder (Assets>Images>Giving), then add it to the "Working with CFWNC" block on the Donor Relations page
   - o Donor Relations trainee will upload "DAF HANDBOOK DOCUMENT TESTING" from Communications>Web>Website Documentation to the correct folder (Assets>Documents>Giving), then link it to the "Download the Donor Advised Handbook" button in the "Working with CFWNC" block on the "Donor Relations" page
   - o Can also practice editing other Call-to-Action blocks text in blocks as needed, remembering to double save!
5. Discuss the Standalone page for Co-investment, which is used for creating public facing links that aren't indexable and can't be Googled. (This may be something that requires further training later in the onboarding process)
   - o Go to Entries>Standalone Pages>Co-investment
   - o Make edits to the accordion/call-to-action as needed
   - o Go to View>Primary Entry page at the top and copy the link address to paste in the co-investment emails
6. Questions?
7. Make sure the trainee is clear that any major design changes need to go through the Communications Director, including enabling/disabling blocks. They have the ability to change the images and update the information on this page.
8. Share "File Upload Tips" PDF with the trainee and show them how to get to Design Standards in the backend or bookmark it

## Women for Women

Note: In advance of training session, Web Admin will need to upload test images and documents to Presentation since WFW Admin has limited access to SharePoint.

1. Show the CFWNC homepage on the big screen (Point out the sections the trainee will edit, so Initiatives>Women For Women and subpages/secure page)
2. Show how to login to the backend of the website using cfwnc.org/admin (Bookmark this since it will drop the user right into the backend)
   - Introduce the layout of backend (Entries and Asset navigation)
   - Show the pages the trainee will edit in the backend. Point out the Section Title, that they do not edit, only content.
     - Briefly explain different block types (Text & Image, Text & Accordion, etc.)
     - Show how to make changes to a page and how to save both the block AND the entry, then how to preview the page to see if changes took
     - Since WFW Admin has access to Accordions and Call-to-Actions, show how to edit these (WFW Homepage has both)
   - Explain the Asset folder structure for Images and Documents (Ex: If you are inserting/replacing an image/document on any WFW page, make sure the image/document is uploaded to the Assets>Images>Women-for-Women  or Assets>Documents>WFW)
3. Establish login for trainee– send the Forgot Password link or have them go to cfwnc.org/admin and click "Forgot password"
4. Have the trainee plug their laptop into the display and practice editing. Use this time to check for access.
   - WFW trainee will upload a test image from Presentation to the correct folder (Assets>Image>Women-for-Women), then replace the image on the Women for Women homepage
   - WFW trainee will upload a test document from Presentation to the correct folder (Assets-Documents-WFW), then replace the 'Download WFW Fact Sheet' link in the blue button on the Women for Women homepage
   - WFW trainee will upload a test document from Presentation to the correct folder (Secure>WFW), then link it to the WFW Secure Page
   - Can also practice editing other Call-to-Action blocks text in blocks as needed, remembering to double save!
5. Discuss WFW login – used for all WFW members to access the secure page of the WFW site
6. Questions?
7. Make sure the trainee is clear that they only edit content (text, images, or documents) and any major design changes need to go through the Communications Director, including enabling/disabling blocks.

8.  Share "File Upload Tips" PDF with the trainee and show them how to get to Design Standards in the backend or bookmark it