

Updated 5 February 2018

# CMS TRAINING CHECKLIST

Project  
Name \_\_\_\_\_

Date \_\_\_\_\_

## 1. Editing content

| # | DESCRIPTION                                                                       | N/A | YES | NO |
|---|-----------------------------------------------------------------------------------|-----|-----|----|
| 1 | Have you demonstrated WHERE to access pages and HOW to edit the pages including:  |     |     |    |
|   | Page attributes (Parent/Template)                                                 |     |     |    |
|   | Visual/text tab                                                                   |     |     |    |
|   | Update button                                                                     |     |     |    |
|   | Permalink                                                                         |     |     |    |
| 2 | Have you explained the WYSIWYG and Toolbar Toggle features?                       |     |     |    |
|   | Paragraph options (h1, h2, h3 etc)                                                |     |     |    |
|   | How to insert hyperlink                                                           |     |     |    |
|   | How to make a list / horizontal line etc.                                         |     |     |    |
|   | How to clear formatting when copying and pasting content into the editor          |     |     |    |
| 3 | Have you demonstrated how to edit the CTAs and linking them?                      |     |     |    |
| 4 | Have you demonstrated how to create new page and add them to the menu navigation? |     |     |    |
| 5 | Have you demonstrated how to edit the contact information and email setting?      |     |     |    |
| 6 | Have you demonstrated where to edit the social media?                             |     |     |    |

## 2. Images

| # | DESCRIPTION                                                                 | N/A | YES | NO |
|---|-----------------------------------------------------------------------------|-----|-----|----|
| 1 | Have you demonstrated how to add a feature image to a page?                 |     |     |    |
| 2 | Have you demonstrated how to edit the homepage slider image/text?           |     |     |    |
| 3 | Have you explained the need for an 'alt text' description?                  |     |     |    |
| 4 | Have you informed the client on the recommended pixel sizes for all images? |     |     |    |
| 5 | Have you shown the client the media library?                                |     |     |    |

## 3. Other

| # | DESCRIPTION                                                                                                  | N/A | YES | NO |
|---|--------------------------------------------------------------------------------------------------------------|-----|-----|----|
| 1 | Have you explained the importance of keeping the CMS version updated for security purposes?                  |     |     |    |
| 2 | Have you explained our 90 warranty from project completion, including what we cover and what we don't cover? |     |     |    |
| 3 | Have you supplied their admin login details including the URL?                                               |     |     |    |
| 4 | Have you demonstrated how to change/update their password?                                                   |     |     |    |

## List all OTHER additional items mentioned

|       |                              |
|-------|------------------------------|
| _____ | <input type="checkbox"/> Yes |
| _____ | <input type="checkbox"/> Yes |
| _____ | <input type="checkbox"/> Yes |
| _____ | <input type="checkbox"/> Yes |
| _____ | <input type="checkbox"/> Yes |

## DISCLAIMER

### TRAINER ONLY

By signing below, you agree that you have thoroughly explained and demonstrated every item listed in this document, and other relevant items suitable to this project.

Full name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

### TRAINEE ONLY

By signing below, you agree that this training has been completed and all items have been explained and demonstrated to you during the course of the training. **Any future enquiries outside of the CMS training will be managed as support through the Support Packages.**

Full name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

STORE IN CLIENT FOLDER IN THE FILING CABINET AFTER COMPLETION.