Transition CA - General Training (Jan 2021)

- **Overview:**
    - Understand the overarching purpose of the site, try to keep this purpose/audience in mind when working and making design decisions
    - The site is largely the processing of a *lot* of files on 2 different platforms (Google Drive and Cascade), it can be confusing so it will be important for us to follow the same file workflow and stay organized (to avoid losing or skipping files, or re-doing ones, etc)
        - This is mainly: File naming conventions, keeping track of what has been done/not done (all following the same color system mainly), and uploading things to Cascade in a certain way
        - Also, to start off, when you update/create any page in Cascade, please save your draft (do not request to publish it) so I can look at it before publishing
    - Please ask me questions at any time, its important that we are all on the same page!

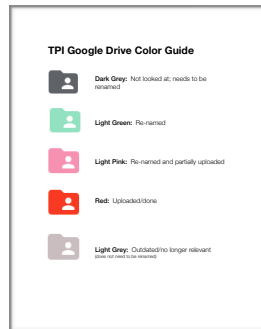- **Current Transition CA Goals:**
    - Get caught up on uploading all COVID documents
    - "Transition Programs" section on front page:
        - Fixing aesthetics of logo placement
        - Adding new pages with logo grids (OC Post Secondary Ed Partners and OC Service Providers)
        - Some (Need clarification from Linda) of these logos need to link to the website as well as a page within our website which contain their documents

- After that, continuing to sort through documents in the Google Drive and upload them in the appropriate place on the website

- **File Workflow:**
  - **Overview:** All of the Transition CA resource files are housed on the Google Drive. All of the "files" on the website itself are just links to the actual file on the Drive (or another website in a few cases). What is uploaded to the website/Cascade is only a *JPG preview image* of the file.

  - **Color coding for Drive folders:**

   Please update folder colors as you work. Refer to this document:

    https://drive.google.com/file/d/1pVFTDtP2GbL5tv9lR1b4bQbNip0scb66/view?usp=sharing

  - **First step: File re-naming**
    - The way we name files on the Drive is important. If the name of the file on Drive is different than how it appears on the website, it can be difficult to cross-reference between the two
    - My first step when uploading a group of files is always to name each file exactly how I want it to appear on the website (this is usually just the name of the document, sometimes with a date; it is usually necessary to fix punctuation and remove extra characters)
    - Do this directly on the drive (see this document for an example)

- **Second step: Generate JPG preview images**
  - Next I download the folder of files and convert the first page of each file to a JPG. This JPG is the preview image that will be uploaded to Cascade
  - I have a script that will do this automatically (I will give it to you if you are on a mac), but you first need to make sure that all of the files in the folder are PDFs (often some are .docx, .ppt, etc)
  - Once you do this you can delete the PDFs off of your own computer (they are still on the Drive)

- **Third step: Upload preview images to Cascade**
  - Next I upload the preview images to Cascade so they can be used on the web pages themselves. This is the step where careful attention is needed, because file uploading and management is tedious on Cascade
  - Files must be organized within folders in Cascade so that we understand what part of the website they coordinate to, and we are able to find certain ones.
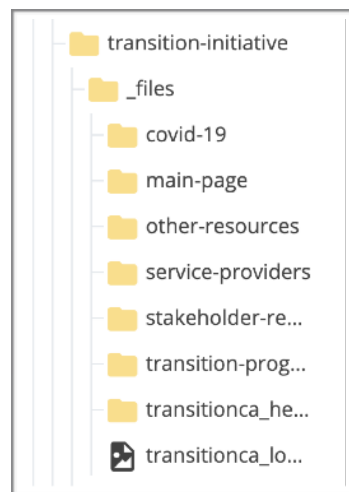
I will explain how to navigate within these folders in more detail!

  - I have accidentally uploaded things to the wrong folder many times, and unfortunately we are not allowed access to move the location of a file (or delete one) after it is uploaded, so you have to request to have them moved

- **Fourth step: Add documents to webpage**
  - Next, you add the preview images and links to each document on the web page itself. I have created a template for each document link that has a preview image, a title, and a link. Each page uses a text block (html) in which the link template is repeated for each document. Please use this template.

    Template for one doc:

  - My process for using this template is: add document preview image from Cascade files, copy document title from Drive and paste it for the title *and* link display text, then copy and paste the share link* from Drive for the correct document
    - * This is the most important step. Make sure share link settings are set so that anyone with the link can view the document. Make sure to update the link for each new document.