

## Revision History

Version	Date	Author	Change summary
1	2023-11-02	Graham Tigg	First version
2	2023-11-10	Graham Tigg	Removed version field

## 1 Background

The Migration team use Open Project (OP) to track the progress of making sites live on SiteWorks.

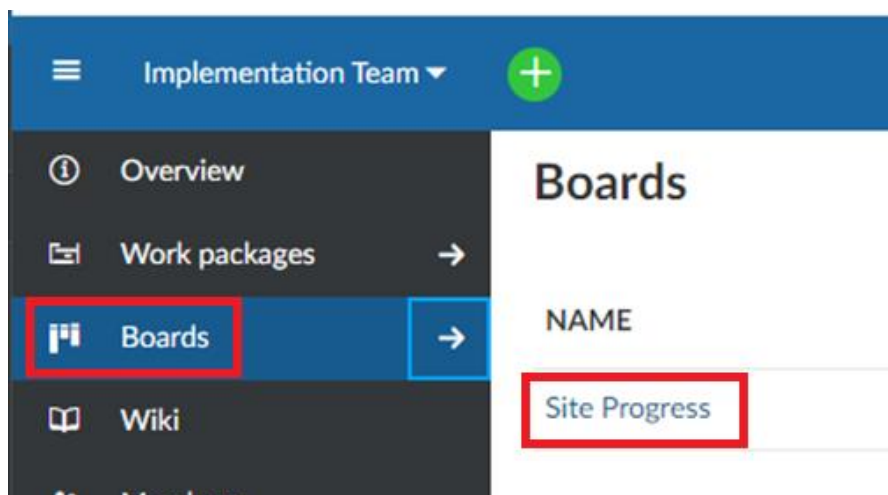
An Open Project 'card' (Work Package) needs to be created for a site once the T&Cs are signed. It will be picked up by the Migration team when the Web Manager has completed

## 2 Open Project

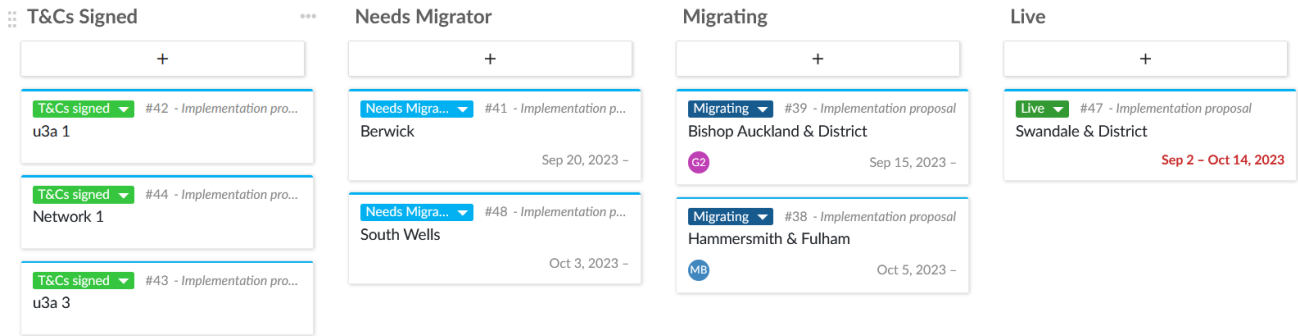
Signing onto Open Project:

- Go to <https://project2.u3awp.uk>
- 'Sign in' with the top-right dropdown. Your User name is your email address. Note that OP cookies can keep you signed-in for weeks.
- Look for 'Select a project' top-left and click on 'Implementation Team'

On the vertical menu select 'Boards' then 'Site Progress'

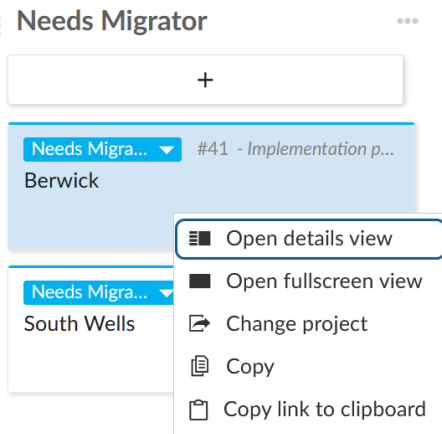


This brings up a white-board view of sites represented by cards (Open Project Work packages) in columns.



Of course the OP Work Packages can be viewed as a list by selecting 'Work Packages' from the menu.

Individual cards can be opened by double-clicking on a card or right-clicking to bring up a context menu:



**Open details view** will open the card on the right hand side of your browser and works well with a wide monitor.

Otherwise **Open fullscreen view** is recommended (the same as double-clicking).

## 2.1 Status and category descriptions

In Open Project these are selected from a drop-down list.

We use four statuses for a site:

T&Cs Signed	<b>I&amp;E</b> create the card when the Trust notifies them T&Cs are signed.
Needs Migrator	Set by <b>I&amp;E</b> when the WM informs them they have finished the Workbook.
Migrating	Set by the Migrator when they take on a site
Live	Set by the Migrator when the production site is in place and the WM can login. Note that making the site publicly visible is under the WM's control.

The categories available in the dropdown are determined by the current category. So, for instance, a card cannot jump from **T&Cs Signed** to **Live** in one step.

Categories track the type of site. Open the card to see:

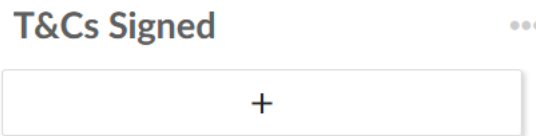
SB migrate u3a	A u3a with a Site Builder site
SB migration Region	A Region with a Site Builder site
SB migration Network	A Network with a Site Builder site
SS u3a	A u3a without a Site Builder site or a u3a that has decided <b>(during Migration)</b> a Starter Site is more appropriate
SS Network, SS Region	Ditto for a Network and Region
Subject area	e.g. Cycling, Climate change

Categories are created by I&E and won't normally need to be changed.

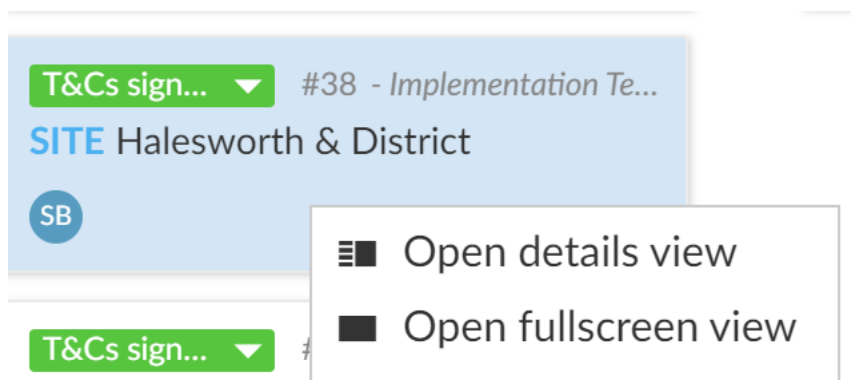
## 2.2 T&Cs Signed card creation (I&E)

This is normally done by I&E when notification of T&Cs is received in Beacon.

- Under the column heading 'T&Cs Signed' click on '+'



- Complete the site name exactly as shown in Beacon (Affiliation field) and then 'enter' to create the card
- Double-click the green T&Cs signed card to open it, or right click and select 'Full screen view'



This opens the card for editing.

**SITE Exeter**

**T&Cs signed** #41: Created by Susan Bell. Last updated on 11/10/2023 4:03 PM.

WM Dave Parsons [webm@exeteru3a.net](mailto:webm@exeteru3a.net)

The Status is the column the card is placed.

The WM contact(s) entered here as free text

### PEOPLE

Assignee -

Accountable

Accountable is the I&E team member creating the card (name picked from a drop-down list)

### DETAILS

Category **SB migrate u3a**

Date **no start date** no finish date

Category - see above.  
Completed when Intro. Zoom attended

Note that the card is updated in real-time and doesn't need to be saved.

Use the return button to return to the board.

**Assignee** is used by the Migration team. To correct a mistake and clear it use the X at the top of the drop down list.

### PEOPLE

Assignee

Accountable Pam Taylor  
 Graham2 Tigg2  
 Susan Bell

DETAILS Mark Bradley

## 2.3 Moves to Needs Migrator

When I&E are informed by the WM they have completed the Workbook I&E change the status to **Needs Migrator** and move it to the bottom of the column with the same name. This may seem like duplication, but it guards against finger trouble when moving cards.

I&E will also enter the date the card changed to **Needs Migrator**. This helps with the management of sites by identifying how long Web Managers have been in the migration phase.