

Pam's summary of overall Implementation 'Road-map'

1. TAT (DO) sends T&Cs to Secretary of u3as in batches as provided by I&E
2. Secretary of u3a authorises T&Cs on behalf of his/her u3a via NetSuite using unique u3a number and logon
3. DO (or authorised TAT person) takes u3a name, date of authorisation, and unique number and adds that information to Beacon
4. I&E check daily to identify new authorisations
 - Note that before next step I&E and Pam need to agree Zoom dates/times but also liaise with Graham on how much capacity is forecast
5. New authorisation triggers I&E to invite that u3a Web Manager (and assistant) to book onto the Zoom Intro via Eventbrite
6. Web Manager (and assistant where applicable) book one of the available Zoom dates
 - Note that there needs to be a step here where I&E keep an eye on bookings to confirm to Pam & Assistant for that day that it's going to go firm but
also if a date needs to be cancelled due
poor take up
7. Eventbrite sends event date reminders to Web Managers one week and 2 hours before the Zoom Intro
8. Pam & I&E Assistant run the Zoom Intro session
9. I&E log attendees, mark on Beacon, and send out training workbook via email
10. Web Manager advises I&E when they complete Part 1 of the workbook (learning SiteWorks) and flag that Migrator assistance is required for Part 2 site planning)

Graham's Migration process picks up at this point ([PDF on the website](#))