



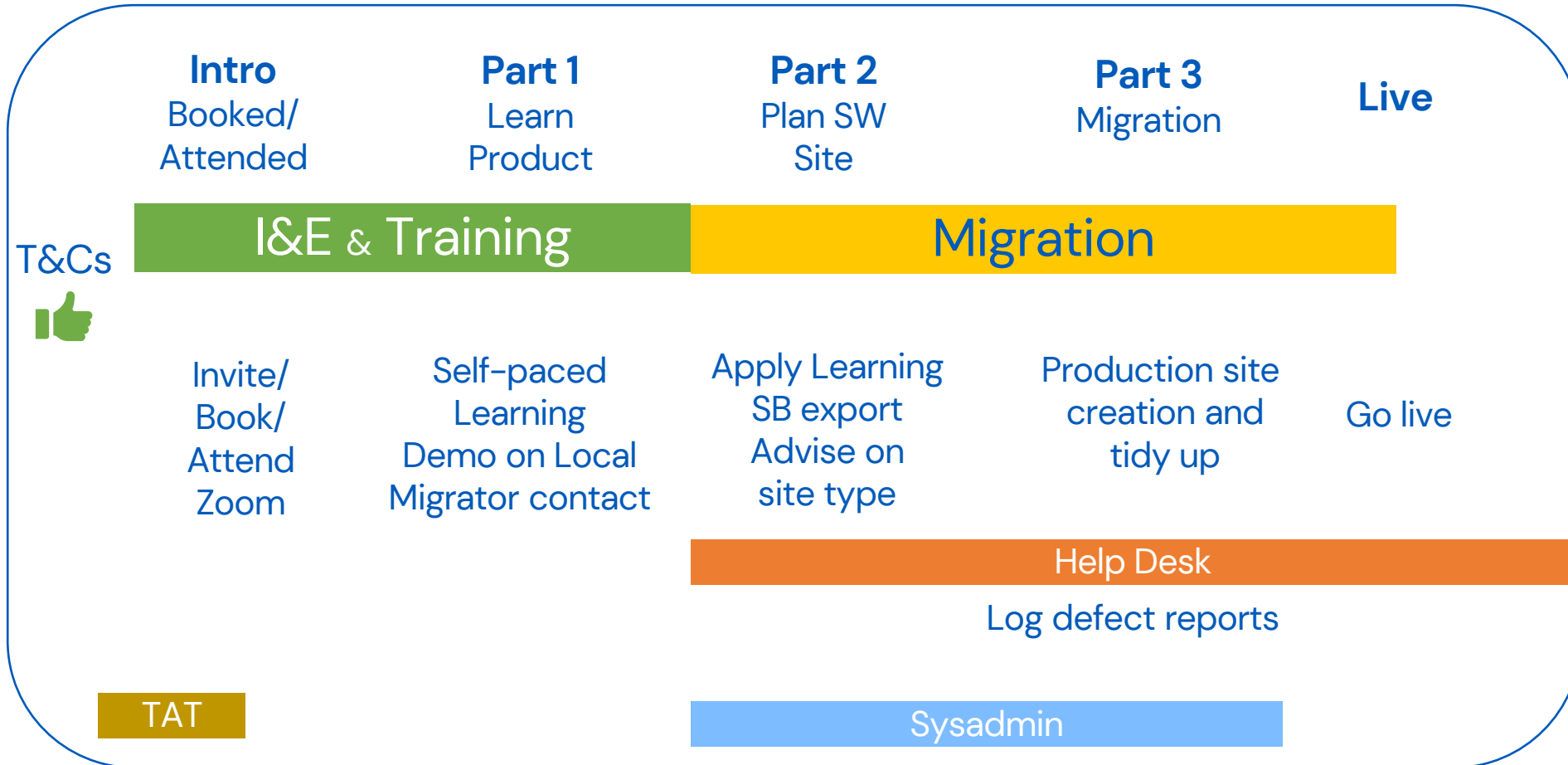
SiteWorks Migration

January 2024

Contents address

1. Roll-out teams and process overview
2. Migrator role and steps we take
3. Open Project to keep track of sites.

5 Major Elements and 6 Teams



Induction and Engagement (I&E)

The I&E Team use a Beacon site to manage all sites from potential to live.

- Sites from the 'queue' are invited to sign T&Cs
- TAT update Beacon with signed T&Cs
- I&E create a 'T&Cs Signed' site card on Open Project for us
- I&E set the card to 'Needs Migrator' when training complete
- I&E need to be aware when a Production site is in place and again when live.

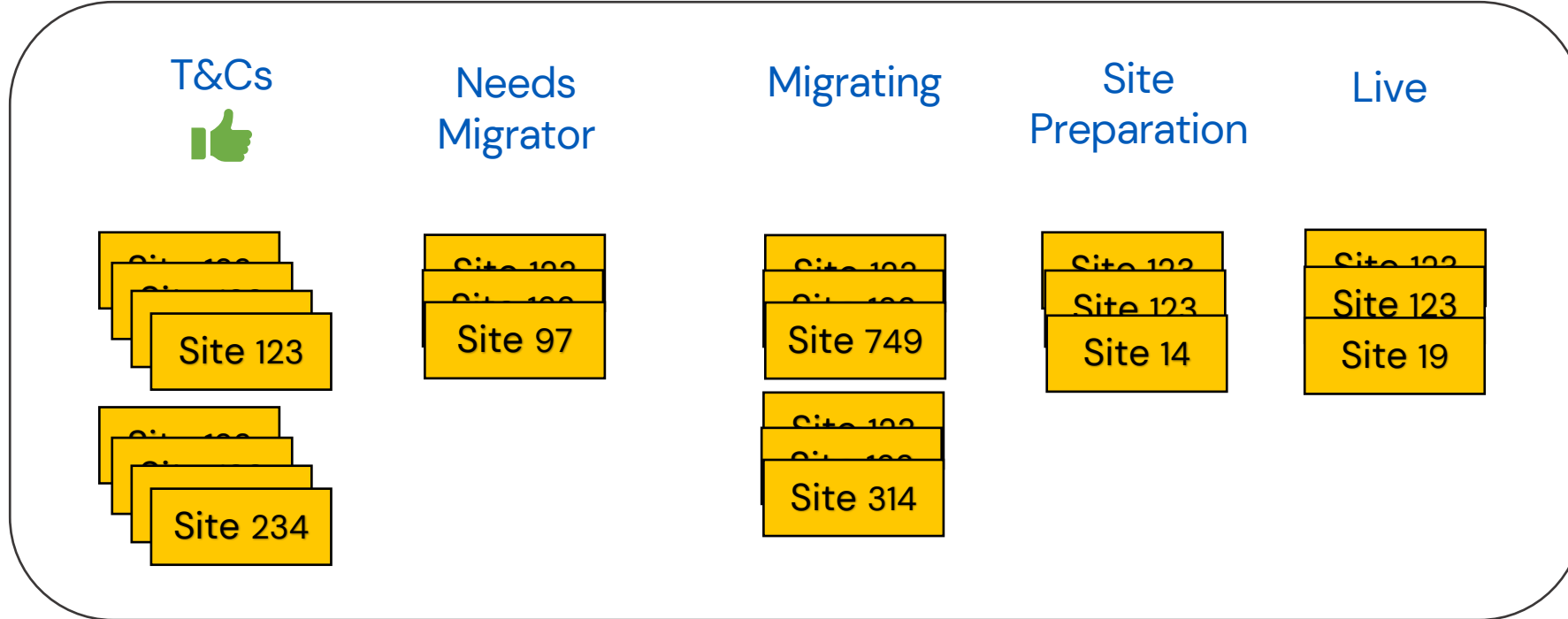
Migrators

- Migrators assigned to sites (self-select from Open Project)
- Request Site Builder extracts (if applicable) and production sites
- Advise WMs – Starter Site vs Migrated, layout suggestions
- Can assist with tidying up, answer ?s, go live checklist BUT we are not trainers
- Don't put Web Managers and ourselves under pressure.

Help Desk

- Provides a support service through an online form
- Is there for issues not covered in the User Guide
- Does not support Local WP, but does cover WordPress, theme and supported plugins
- Should always be used to report bugs and enhancement suggestions.

Electronic Post-it board (Open Project)



I&E create and move to 'Needs Migrator'

Migrator assigned

Post-it cards

I & E Create

- u3a or site name and WM contact(s)
- I&E contact
- Category 'SB u3a', 'SB Network', 'SS u3a' (distinguishes Starter Sites)
- Intro session date
- Status and column = 'T&Cs Signed'

Migration

- Add Migrator contact
- Log of notes e.g. 'WM away until date'
- Production site – subdomain
- Live site – date
- Move cards along (Status)

Cards are for our benefit.

Record enough so a colleague could pick up if necessary.

Open Project

We use Open Project free edition

Separate instance to Testing/Change Board

There are restrictions:

- Cannot rename fields e.g. Assignee → Migrator, Accountable → I&E

What is left to do?

- Open Project email capability
- Phase 3 to familiarise, practice and fine tune
- Help Desk ticketing setup (Zendesk).

Summary of Migrator Role

- Select site from Open Project (OP) and contact Web Manager
- Request Site Builder export, advise 'Migrated' or 'Starter' site
- Soundboard for site design, can assist with 'tidying up'
- Request production site and update OP
- Go live checklist with Web Manager
- Update OP when live

[until OP has email we need to inform I&E when Prod. Site created and finally when live]

Migrated vs. Starter site

- Migrated only applies when there is a Site Builder site
- Does not save significant time for the SiteWorks team
- Gives the site a great starting point e.g. all the media in place and creates a basic structure
- Quicker to delete unwanted content that create new.

May not apply

- Site Builder site is way out of date
- Small u3a and Web Manager has time on their hands
- Radically different site structure envisaged
- Web Manager unable to get Local WP going.

User Group and (speculation) Mentors

- The Pioneers meeting has evolved into a User Group providing further support and input into enhancements.
- There has been an idea that migrated Web Managers become Mentors to support live sites once Migrated. They can also assist new inexperienced Web Managers*
- Mentors add value to the Help Desk in areas they don't cover, such as design suggestions or a good way to do something.

* If there are 500 SiteWorks sites with 750 Web managers and a Web Manager moves on after 4 years then 15 new WebManagers need training every month.

Questions ?



Revision History

Rev.	Date	Author	Changes
1	2023-08-04	Graham Tigg	First version
2	2023-08-05	Graham Tigg	Two sections – Phase 3 and Where we are
3	2023-10-08	Graham Tigg	Migration Team version
4	2023-10-16	Graham Tigg	Tweaks to going live
5	2024-01-05	Graham Tigg	Made it more a an intro. for future team members than Phase 3