Carnegie Mellon University

CMS Transition to v5 Templates: Auto-Migration Checklist
3/17/17

Auto-Migration: Keeping your current site's content while moving into
the new design.

Important Deadlines
Now - April 17: You submit site transition choice
1 Month Before: Computing Services emails you scheduled auto-migration date
1 Week Before: Computing Services emails you with a reminder
2 Weeks After: You submit site publish request

Before Site Transition

CMS Site Sponsors & Leads
• Submit site transition choice via the <u>web form</u> (**Deadline**: April 17, 2017) • Register for workshops (optional)* • Identify and remove outdated and incorrect content • <u>Discard drafts</u> • Review the <u>CMS Demo site</u> as well as new training and resource materials found on the Web Resource site* • Sites will be scheduled for auto-migration in phases. Computing Services will communicate the date and details of your site transition 1 month in advance. If this timeslot conflicts with critical business processes, opt-out and your site will be scheduled for another date. • A reminder will be sent from Computing Services 1 week in advance of auto-migration date.

During Site Transition

CMS Site Leads & Users
• Download version 4 site backup from the Box link provided by the Computing Services team. • Review updated navigation, clean out unnecessary pages and organize remaining pages • Double check formatting and layout on all pages • Proofread and test all pages • Review site on staging server with your team and site stakeholders • Plan any necessary URL redirects* • Submit a publish request. Indicate if you would like the Online Strategy team to review the site prior to launch. Include specifications for redirects. (**Deadline**: 2 weeks after site auto-migration) **Optional Action Items** • Gather additional photography (optional)* • Remove old header photo from page WYSIWYG fields and add hero content types with large images (optional) • Review pages that previously had custom code blocks (only applicable to sites that manually added custom code)* • Add 3rd party analytics code to site setup block (optional)* • Bring unresolved questions to office hours (optional)

After Site Publish

CMS Site Leads & Users
• Check broken links and make fixes (optional)* • Verify that data is being sent to any additional analytics tools (optional)*

Important Notes

- Custom code will need to be reapplied, such as analytics code.

- Once a site is auto-migrated, the content will need to be managed in both the v4 and v5 sites until the v5 site goes live. To avoid duplicative work, we recommend publishing as soon as possible.

- Old page versions will be lost as part of the auto-migration process.

- Items in the recycle bin will be lost as part of the auto-migration process.

- For help, contact the Computing Services Help Center at 412-268-4357 (HELP) or it-help@cmu.edu.

The Web Resource Site, which will feature documentation, training materials, photography resources and workshop details will be published in April.