Client Content Migration Guide

VISION™

Contents

Overview

What is Content Migration?

Content migration is the most time consuming part of many website projects. During this phase, Vision migrates the agreed upon scope of content, as is, from the current website to your new website.

When does content migration occur?

The Content Migration phase begins simultaneously with the graphic design phase and is completed at the same time as the development phase. The goal of the Development phase & the Content Migration phase is to deliver a complete website prototype hosted on a development server, including all pages that were migrated based on selection during the Content Preparation Phase.

How is it done?

Vision delivers a Content Migration sitemap with a Current Sitemap and a Proposed Sitemap to your team. Your team will then work on finalizing the page on the Proposed Sitemap tab by re-arranging, deleting, or creating any pages as you see fit. In the Proposed Sitemap, you will tell Vision which pages to migrate over to the new website, and Vision will migrate the pages during the Development Phase. After the website has been prototyped, any remaining content to be migrated will be done by your team.

What are the tools?

The Content Migration sitemap is delivered as an excel spreadsheet. To migrate new pages of content, you will fill out a Content Migration Template word document and upload it, along with any document or image attachments, to Box, an online file sharing application.

Current Sitemap

The Current Sitemap tab on the Migration Sitemap Excel spreadsheet gives a visual representation of all of the current pages on your website. Each row represents a unique page on your website.

In Column C, the titles are separated into Levels by color and indentation, with a lower page level having a greater page indentation. Level 1 is your website's main navigation. Level 2 pages live as subpages of the most recent Level 1 page above it, and so on with each level under.

In Column D, the source URL is the unique page link on your website.

In Column E, any notes on special attributes to that page are listed (i.e. # of PDF pages, special iFrame inserts, special widgets or features).

Proposed Sitemap

Determining the Proposed Sitemap

The Proposed Sitemap tab has a visual representation of all the proposed pages, rearranged from the Current Sitemap tab to match the new main navigation from your latest website design.

After Vision delivers the Content Migration Sitemap Document to your team, it's your job to look through the "Proposed Sitemap" tab and to:
1. Finalize the page structure of the pages for your new website; column C
2. Specify which pages will be brought over to the new website by Vision; column I
3. Specify where content will be brought over to the new website from; column D

Below is an example of a properly filled out Proposed Sitemap:

Vision arranges the pages on your Proposed Sitemap based off of the new navigation menu on your approved homepage wireframe layout. We place each page under the main navigation category that fits best.

Review the Proposed Sitemap tab and move or edit each page to live under the page structure that you would like. To move a page, select the row of the page by clicking on the row # on the very left, then cut the row (Ctrl + X), click on the row under where you would like this cut row to live, and then paste the row (Ctrl + V). You can select and move multiple rows at once.

Proposed Sitemap

Filling out the Proposed Sitemap

For new pages to be added to the Proposed Sitemap, follow the instructions below:

1. Put the title of the page in Column C.
2. List the source of the page – either the URL of the live page or the name of the Microsoft Word file uploaded to Box, in column D. If you are rewriting your website content, please read the "Content Migration Template" for further instructions.
3. In Column G, list the Components Source, if applicable.
   a. The "Components Source" tab contains a list of Components available. The applicable page template will be applied based off of the Components Source listed.
4. Assign a Content Group to each page (column H) that reflects the content ownership groups you defined in the permissions worksheet.
   a. First, update the placeholder Content Group names with actual ones in the "Content Group Source List" tab.
   b. Then, in column H, use the dropdown to select the Content Group.
5. Mark "1" in column I for pages that Vision will migrate. The "Total Count" box counts the number of pages you have marked for Vision to Migrate.
   a. Pages without "1" in Column I are pages that you will migrate yourself.

Olathe Library, KS (Proposed site map)

Navigation Name/ Level [Required]	Location (MS Word file of URL) [Required]	Site Map Notes	Client Migration Notes (Client/PM)	Component/ Redirect/ Connect	Content Group [Required]	Vision to Migrate (1=yes) [Required]
Home					Library	1
About Us					Library	1
Administration & Policy	http://olathelibrary.org/administrationandpolicy				Library	1
Advisory Board	http://olathelibrary.org/board				Library	1
Board Meeting Minutes	http://olathelibrary.org/policies/board-meeting-minutes	contains 125 pdf links		Document List	Library	1
Library Vision & Mission Statement	http://olathelibrary.org/vision				Library	1
Code of Behavior	http://olathelibrary.org/codeofbehavior				Library	1
Library Policies	http://olathelibrary.org/policies	contains 34 pdf links			Library	1
Annual Report	http://olathelibrary.org/annualreport	contains 10 pdf links, iFrame			Library	1
Borrowing Privileges	http://olathelibrary.org/borrowing				Library	1
Employment Opportunities	http://olathelibrary.org/employment			Job Postings	Library	1
Hours & Directions	http://olathelibrary.org/hours	Google Maps iFrame			Library	1
Library History	http://olathelibrary.org/history				Library	1
1909	http://olathelibrary.org/history				Library	1
1914	http://olathelibrary.org/history_part2					

Total Count (200 Pages Allowed in scope): 14

READ THIS FIRST-INSTRUCTIONS | Proposed Site Map | Current Site Map | "How Do I" Starter | Content Group Source List | Components Source

Proposed Sitemap

Description of the Components

WIDGET	DESCRIPTION
Business Directory Box	Limited listing of the business directory—displays limited information but allow users to click through to a linked page displaying full information
Business Directory List	Full listing of the business directory
Calendar Box	"Box" widgets are designed to be placed in sidebars. They only display limited information but allow users to click through to a linked page displaying full information.
Calendar Advanced Grid	Same as Calendar Grid below, but with more detailed information
Calendar Grid	Full page calendar
Calendar List	List of calendar events
Calendar Meeting List	Specialized variation of the Calendar List that includes columns for links to meeting agendas and minutes
Calendar Mini Grid	A small monthly calendar that highlights dates with scheduled events. Typically placed in a narrow column on the side of a page
Content Area	This is the widget used on page templates for general text and information
Content Filter Widget	I believe this is used in combination with Calendar, Facility, News, & Staff lists. It provides a text search field that allows users to filter the results displayed based on their provided search term
Custom Content	Displays information from pre-configured custom content generally speaking this widget is reserved for use with the homepage
Document Folder	Exposes a specific folder in the document repository to the public making all documents in the folder publically accessible
Document Folder Box	Exposes a specific folder in the document repository to the public making all documents in the folder publically accessible, but in a more polished layout than "Document Folder"
Document List	Exposes a manually curated list of documents from the document repository to the public
Document List Box	Exposes a manually curated list of documents from the document repository to the public in a more polished layout than "Document List"
ENotification	Used to allow users to subscribe to email notifications
Facebook Feed	A live feed of Facebook posts
Facility Directory Formatted List	A fancy list of facilities
Facility Directory Multi-Select Categories Map	A map of facilities that allows users to narrow down the facilities shown by category
Facility Directory Standard Map	No category filter option
Facility Directory Table List	Facility directory list in table format
FAQ Box	Limited listing of FAQ items—displays limited information but allow users to click through to a linked page displaying full information
FAQ List	Full list of FAQ items
Form Detail	Used to display a specific form on a page
Form List	Full list of forms
Image Random	Loads random images from a pre-defined pool of images upon each page load
Image Rotate	Displays images from a pre-defined pool of images—continuously rotating
Job Posts Box	Limited listing of job posts—displays limited information but allow users to click through to a linked page displaying full information
Job Posts List	Full list of job posts
Main Menu	Displays mega menu

Proposed Sitemap

Description of the Components

News Box	Limited listing of news items—displays limited information but allow users to click through to a linked page displaying full information
News List	Full list of News items
Online Polls Detail	Used to display a specific poll on a page
Online Polls List	Full list of online polls
Page Title	Page title isn't displayed on a page unless this widget is on the page
Photo Album	Used to display a specific photo album on a page
Photo Album List	Full list of photo albums
Redirect	System use
RFP Posts Box	Limited listing of RFP posts—displays limited information but allow users to click through to a linked page displaying full information
RFP Posts List	Full list of RFP posts
RSS Feed List	Full list of available RSS feeds
RSS Feed Viewer	Used to display specific RSS feeds
Search	Search bar
Service Directory Box	Limited listing service directory items—displays limited information but allow users to click through to a linked page displaying full information
Service Directory List	Full listing of the service directory
Service Request	Used for all interactions with our Service Request component
Side Navigation Menu	Shows the current page and parent, child, and sibling pages
Site Map	Display sitemap of entire site
Staff Directory Box	Limited listing staff directory items—displays limited information but allow users to click through to a linked page displaying full information
Staff Directory List	Full listing of the staff directory
Twitter Feed	A live feed of twitter posts
Website Login Bar	Displays a login link for the extranet, not used very much because we usually put login links in custom content
Yahoo Weather Javascript Widget	Displays weather information sourced from Yahoo Weather

Additional Information and Best Practices

- Maintain all formatting, including the color and indentation—that way our team can distinguish each page/page level. This can be done with format painter in Excel.
- Keep the content migration sitemap in the original template format. If needed, add more columns to the right for comments but do not alter the Excel sheet structure/formatting or delete any rows already created.
- Please make all migration instruction notes in column F.

Content Migration Template

The Content Migration Template is a handy guide for rewriting your website content. Even if it will be your staff performing the actual migration, the Content Migration Template affords your team the ability to write the new content in advance of having the actual website ready. This section will walk through the Content Migration Template step-by-step for each of the respective sections.

Current URL Address
Include the source URL for the page being migrated so that the migrator or staff member can refer to it during migration.

Page Title
The page title/navigation on the current site

Map ID# from Proposed Sitemap
Row/Map # from the ID # column so that the migrator can confirm that the page being migrated matches what's indicated on the sitemap.

Navigation Name (from Proposed Sitemap)
Fill this section out if the page will have a new title on the new site.

Department
Specify the Department/Content Group that this page will belong to.

Subject Matter Expert
Staff Member who currently manages the page and/or will be managing it on the new site.

Submitted by
Staff that rewrote the content

Page Content
The rewritten page content will be placed here. For documents and images used in the page body, use tags such as [documentname.pdf] to denote where the link should be placed. Likewise, use a tag like [imagename.png] to indicate where an image should be placed.

Attachment(s) & Image(s)
Any documents and images to be used. Include the filenames so that the migrator is able to verify that the correct ones are being used.

Update Frequency
The period which the Subject Matter Expert/Author will review the page and if it needs to be updated.

Setting Up the Box Folder

Once the Content Migration materials have been prepared (Proposed Sitemap, Department Access Matrix & User Permissions, and the Content Migration Templates), the final step is to add the Content Migration Templates, images, and documents to the Box folder provided by your Project Manager earlier in the project process.

Folder Structure

The Box folder should be organized so that each page is contained within its own folder, with the subpages being relegated to subfolders within their respective parent pages. Additionally, each folder should contain the following:
Content Migration template for the page
1.Folder for Images linked on the page
2.Folder for documents linked on the page

Here is a quick visual representation of how the folders should be set up:
I.   Level 1 Page Folder
       I.   Level 2 Page 1 Folder
            I.   Level 3 Page 1 Folder
            II.   Images Folder
            III.   Documents/Attachments Folder
            IV.   Content Migration Template.doc
       II.   Level 2 Page 2 Folder
       III.   Images folder
       IV.   Documents/Attachments folder
       V.   Content Migration Template.doc

Images and documents will be sorted by Content Group for the Image Library and Document Central, but if your organization wants a specific folder structure, please provide it to your Project Manager.

3rd Party Integrations

Most likely your team will have certain applications or tools that cannot be replicated using the visionCMS functionality without additional customization. In these instances, the 3rd party integrations will need to be reviewed on a case-by-case basis with your Project Manager. There are two primary methods of integrating these 3rd party applications on the new site: iFrame and HTML Templates.

iFrame
An iFrame allows you to place external content within a given space, allowing the framed content to appear seamlessly integrated within the page. iFrames are added using the HTML editor and inserting the iFrame tag into the desired position.

Keep in mind that the framed content needs to fit within dimensions of the content area, otherwise website viewers will have to use scroll bars to adjust the frame view to see all of the framed content.

Lastly, any content that is iFramed should come from an SSL-protected URL. If using https instead of http in the URL results in the content not appearing, then it will have issues displaying on your site if it utilizes https.

HTML Template
In cases where an iFrame is not sufficient for displaying the content either due to SSL issues or the content not framing correctly, an HTML template is a suitable replacement. Pages utilizing an HTML template exist within your internal network on a subdomain, but will feature the same appearance and layout as the main website.

Once development for your site has been completed, ask the Project Manager to provide the HTML templates. The HTML templates can be utilized like so:
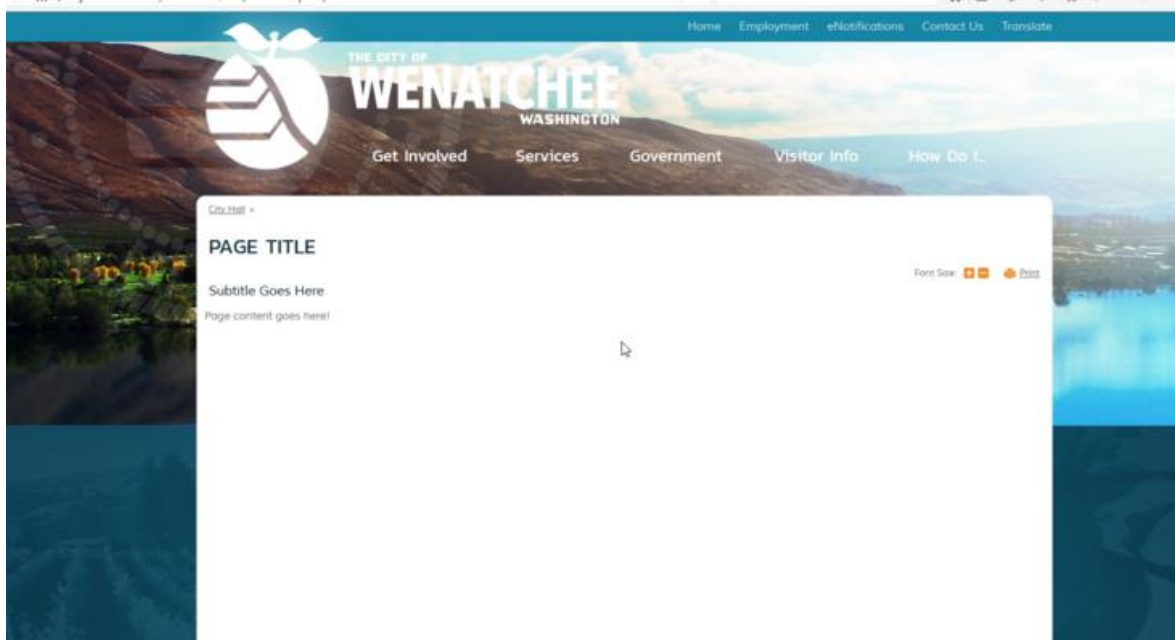
1. Open the template for the site/page style you are trying to use:
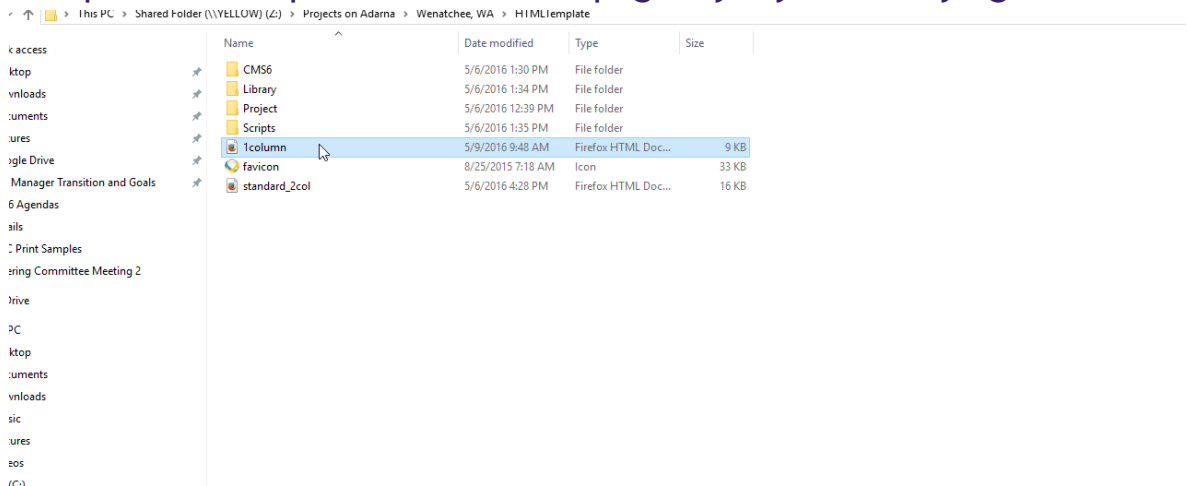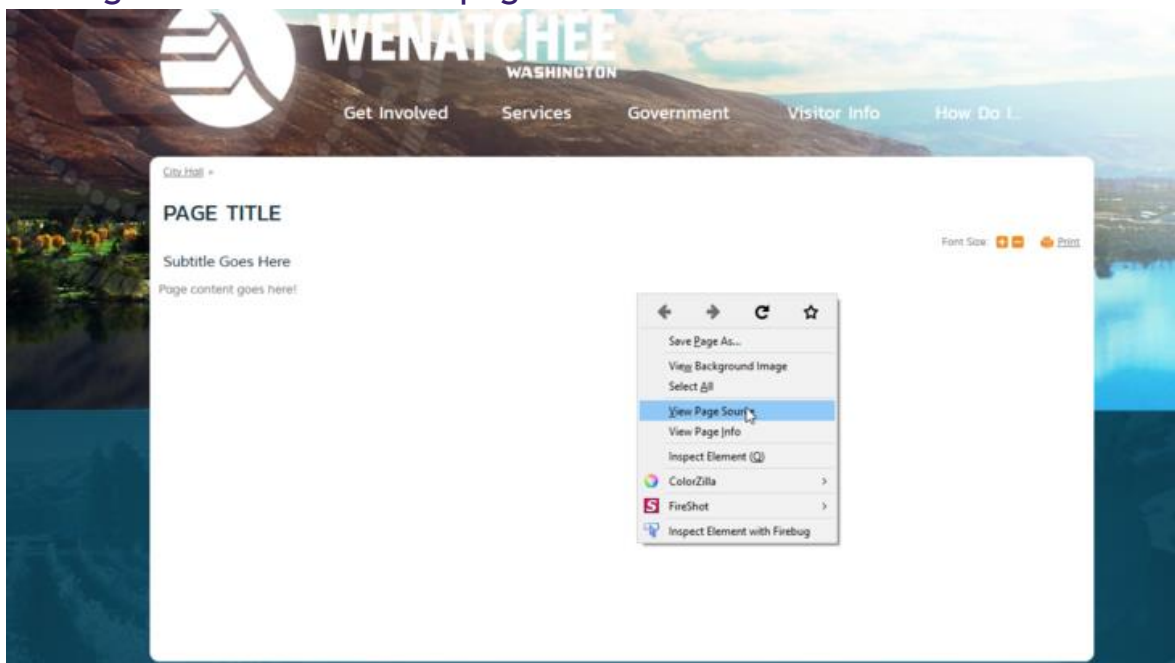
3rd Party Integrations

HTML Template - Continued
2. The file should open in a browser:

3. Right-click to view the page source:

3rd Party Integrations

HTML Template - Continued

4. Copy the code and use it for creating any new pages or paste it into any 3rd party applications using the page template:

```html
1  <!DOCTYPE html>
2  <html>
3  <head id="Head1">
4      <meta charset="UTF-8" />
5      <title>HTML6 Template</title>
6      <meta name="viewport" content="width=device-width">
7      <script type="text/javascript">
8          //script for making "view full site" button work on mobile devices
9          var isResponsive = 'yes';
10
11         if (isResponsive == "no") {
12             document.write('<meta name="viewport" content="width=980" />');
13         }
14         else {
15             document.write('<meta name="viewport" content="width=device-width" />');
16         }
17     </script>
18
19
20
21     <link rel="stylesheet" type="text/css" href="CMS6/DefaultContent/Default/custom.css">
22     <link rel="stylesheet" type="text/css" href="CMS6/DefaultContent/Default/editor.css">
23
24     <link rel="stylesheet" type="text/css" href="Project/Contents/Main/custom.default.css">
25     <link rel="stylesheet" type="text/css" href="Project/Contents/Main/custom.desktop.css">
26     <link rel="stylesheet" type="text/css" href="Project/Contents/Main/custom.media.css">
27     <link rel="stylesheet" type="text/css" href="Project/Contents/Main/editor.css">
28
29     <link rel="stylesheet" type="text/css" id="active_font" href="Project/Contents/Main/x-small.css">
30
31
32
33     <link rel="stylesheet" type="text/css" href="CMS6/DefaultContent/Default/print.css" media="print">
34     <link rel="stylesheet" type="text/css" href="Project/Contents/Main/print.css" media="print">
35
36     <script src="Scripts/jquery/jquery-1.8.3.min.js"></script>
37
38
39
40     <script type="text/javascript">
41         //script for view full site button, placed here to keep firefox for mobile devices happy
42         $(function () {
43             var viewFullElement = document.getElementById("view-full");
44             if (viewFullElement) {
45                 if (isResponsive == "yes") {
46                     viewFullElement.className = 'mobile_only fullsite';
47                 }
48                 else {
49                     viewFullElement.innerHTML = 'View Mobile Optimized';
50                     viewFullElement.className = '';
```