

CMS Migration Preparation Guidelines

Summary

The following guide will help you prepare your content to migrate from Sitecore to Cascade. These recommendations might be revised or added to as the Digital Team learns more from using Cascade's migration tools as we migrate content.

Review Sitecore Content

The first step involves creating a list of the pages organized within your website in Sitecore. Use the Sitecore Content Tool to generate a list of all existing pages within a site.

Sitecore Content Tool: <https://www.cms.ualberta.ca/sitecore/admin/pagestats.aspx>

The list can be sorted alphabetically by clicking the column headers. You cannot export the list as a spreadsheet, but if you select the table content you can copy and paste the rows into a spreadsheet and the formatting will copy over as well.

This list includes published and unpublished content within the Content Tree. Use the list to look through your pages to decide if out-of-date and unnecessary content can be deleted. If a page is currently unpublished consider carefully if that content needs to be within the CMS.

Note redirect links within the Content Tree. These redirects will not be migrated over. We are still learning about how redirects can be managed within Cascade. This does not affect vanity URLs (i.e. uab.ca).

Note pages with multiple versions. Only the most recent version of a page will be migrated over. If you need to preserve previous versions, you will need to find an alternative way to save the page.

Step Summary

1. Use Sitecore Content Tool to list existing content.
2. Only current version of pages will migrate. Check if older versions need to be preserved.
3. Flag unpublished/unpublishable content to see if these items are still relevant.
4. Check redirects to ensure they are still needed as they will not be migrated.
5. Offline archive of page HTML content will be created in .zip format before migration.

Review Sitecore Media Library

The next step involves creating a list of items within the media library within your Sitecore site. For the purpose of the migration, there are two types of media:

1. Linked media is content that is currently linked on a published page of the website. Linked content refers to media files that have a URL path on a published page that the migration tool can crawl.
2. Unlinked media is stored within the CMS but is not linked on a live page.

The Digital Team will provide an export of all items in the media library prior to migration, but *only linked media items* will be moved into the new CMS.

Use the Sitecore Media Tool to generate a list of all content within the site's media library to review which content needs to be migrated or deleted.

Sitecore Media Tool: <https://www.cms.ualberta.ca/sitecore/admin/mediastats.aspx>

The list can be sorted alphabetically by clicking the column headers. You cannot export the list as a spreadsheet, but if you select the table content you can copy and paste the rows into a spreadsheet and the formatting will copy over as well. The tool shows a true or false value for whether the media item is linked in the content. Use that to sort unlinked content to review.

Step Summary:

1. Use Sitecore Media Tool to find unlinked content that will not be migrated.
2. Save unlinked content offline or delete prior to migration (if desired).
3. Offline archive of all media content will be created in .zip format before migration.

Review Past Event Content

Events will continue to be generated in the new CMS by pulling data from a Google Calendar. No migration preparation is required for events. However, past events will not be pulled into the new CMS, so existing pages for old events will no longer work. If that content needs to be preserved, consider alternatives for saving that content.

The central university calendar will also be decommissioned when the institution pages are migrated to the new CMS.

Step Summary:

1. Consider whether any pages for past events need to be preserved
2. Find alternative for saving page content such as archiving HTML offline

Review Page Traffic in Google Analytics

In addition to flagging out-of-date and unpublished pages, you can further clean your websites by finding pages that are rarely visited.

Google Analytics can help you find pages with few page views. Use the All Pages report under the Behavior section in Google Analytics to find pages that can be deleted from your website with minimal impact to end users. Be sure to select a date range that covers the full range of activity on your website.

Google Analytics Content Filter Guide:

<https://docs.google.com/document/d/13yx2iGi-tyocEmVyuGiSQqDFOd4Iob66LlfMP3NqMsY/edit>

You can export the report from Google Analytics as a spreadsheet and then sort by pages with views. Less than 100 in a year might be a good starting point. Adjust as needed to find pages that can be deleted before migration.

Step Summary

1. Get access to Google Analytics for your site. Submit a request here: uab.ca/swr.
2. Use Google Analytics All Pages report to see page views of long date range.
3. Export data and flag pages that are infrequently visited.

Delete or Archive Pages and Media

Once you've developed a list of pages, content and media files that can be removed from the website, begin deleting that content from the CMS. Delete as much as you can to simplify the migration process. Archive content only if necessary. Remember that pages migrated to the new CMS may need to be touched up, including archived pages.

The Digital Team will archive page HTML and media items within Sitecore prior to the migration. These files will be provided to the website admins.

Archiving pages and media content can be done two ways:

1. Extract the content from the CMS by downloading the file or using an archive tool.
2. Create an archive folder or page in the CMS and move content under that folder/page.

If you choose to archive pages or media within the CMS, we recommended naming the parent folder or page “_archive” to make it easier to find while moving content within Sitecore. How you choose to archive these items is up to your preference.

You can also use these tools to extract pages and archive content offline. These tools will only pick up linked content on published pages.

Mac: <https://peacockmedia.software/mac/integrity/free.html>
<http://ricks-apps.com/osx/sitesucker/index.html>

PC: <https://www.httrack.com>

Online: <https://archive.is/>

Step Summary

1. Archive pages that don't need to be migrated to the new CMS using provided tools.
2. Archive pages that need to remain in the new CMS using a structure that works for you.
3. Delete as many pages and media as possible.

Find Custom Design and Code

Pages that use custom CSS, HTML or Javascript need to be flagged before the migration. The Digital Team will migrate custom CSS and JavaScript into the new CMS but the form and functionality of these custom pages may not work post-migration.

The CSS code base for the university's website will be updated to Bootstrap 4 during the migration. This change won't affect the overall appearance of the website but it could affect pages that use custom CSS and inline CSS.

Check your Site Configuration folder for custom JavaScript and Stylesheets. You should also use the Sitecore Search Tool to find pages that have inline style and script tags.

Sitecore Search Tool Guide:

<https://docs.google.com/document/d/186u7DsBPoMHwlnAuQ-OPQwb1IJ0g8SHVTQQvflOUFIU/edit?usp=sharing>

Pages that use custom CSS/Scripts can be revised prior to migration to remove customization or flagged to check after migration. Fixing custom CSS/Scripts will be the sole responsibility of the website admins and content creators.

Step Summary

1. Use script tool to find pages using custom CSS or inline CSS.
2. Check the Site Configuration folder in Sitecore for custom CSS or JavaScript.
3. Revise pages where possible to remove customization.
4. Flag remaining pages to check for required fixes after migration.

Find References to Subdomains

The existing subdomain redirects for websites housed within Sitecore will be decommissioned as those sites are migrated into Cascade. Subdomains for websites outside the current CMS will not be affected.

In May 2019, the Digital Team sent a list of existing subdomains that redirect to a Sitecore website for website admins to review. The web admins will be responsible for notifying internal staff of this change, or seek support through comms staff within their unit.

Based on our analysis, most redirect traffic from subdomains comes from email signatures and web browser bookmarks. Older print pieces might also need to be reviewed to ensure they don't list the subdomain. Website admins can also use the Search tool in Sitecore to look for hard-coded links to subdomains.

Sitecore Search Tool Guide:

<https://docs.google.com/document/d/186u7DsBPoMHwInAuQ-OPQwb1IJ0g8SHVTQQvfLOUFiU/edit?usp=sharing>

Step Summary

1. Review list of subdomains to be decommissioned.
2. Search for hard-coded links within Sitecore.
3. Send internal comms to staff requesting they update email signatures and bookmarks.
4. Request staff to review print pieces to check for publications that list subdomain.

Review Users and Roles

Users and roles cannot be migrated between Sitecore and Cascade because roles are handled differently between the two platforms. The Digital Team will re-add website admins when the website is migrated. Those admins will then have to re-add other authors and editors. The Digital Team is currently working on a standard for user roles and will provide guidance to website admins when the framework is available.

Use the User Manager Tool to generate a list of existing website admins, authors and contributors.

User Manager tool: <https://www.cms.ualberta.ca/sitecore/admin/usermanager.aspx>

Step Summary

1. Use User Manager Tool to list existing users
2. Note only the users who should be re-added
3. Define roles for users

List of Tools

Sitecore Tools

Sitecore Content Tool: <https://www.cms.ualberta.ca/sitecore/admin/pagestats.aspx>

Sitecore Media Tool: <https://www.cms.ualberta.ca/sitecore/admin/mediastats.aspx>

User Manager tool: <https://www.cms.ualberta.ca/sitecore/admin/usermanager.aspx>

Guides

Google Analytics Content Filter Guide:

<https://docs.google.com/document/d/13yx2iGi-tyocEmVyuGiSQqDFOd4Iob66LlfMP3NqMsY/edit>

Sitecore Search Tool Guide:

<https://docs.google.com/document/d/186u7DsBPoMHwlnAuQ-OPQwb1IJ0g8SHVTQQvfLOUFIU/edit?usp=sharing>

Archive Tools

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