

Content Migration Checklist

Assign a Project Manager to oversee the entire content migration project

As with any large scale undertaking, having a designated team member who takes the lead is imperative for success. While each member of the content migration team will have an important part to play, this is the first and most important decision in starting a content migration exercise.

Legacy site content review

Once you have decided that you're no longer happy with your site, or you've been tasked with modernizing it, your first step is to take a good, hard look at the web presence you have and determine what your primary goal is for the future. This could be anything from a minor redesign of the visual elements to a complete overhaul in both design and content and anything in between.

- Review all design elements of the site
- Review all current site content
- Review functionality and fundamental code of the site

Estimate a timeline for the entire project

Have the project manager gather together representatives for all of the migration and website relevant groups including stakeholders, communications, IT, content authors, content migrators, etc. This step is crucial for staying on budget and on deadline. Include a "content freeze" in your timeline: this is to ensure that content is "frozen" avoiding a potential issue with a content author creating or editing something in the old environment, only to have it missed during migration. The content freeze should be scheduled right down to the day and even time, just to certain that you won't have to go back and reworking anything that's been added.

TIP: Start as early as possible. Content migration always takes significantly longer than organizations expect.

Develop and confirm the new information architecture guidemap

Whether you have engaged a user experience specialist or painstakingly gone through the motions to develop it yourself, the IA for the new site will play a big part in a) ensuring that all desired legacy content gets migrated and b) help in pointing out the content gaps where new stuff will need to be written.

Create a current site content inventory

There are a few different ways to create a database of all your site content, but our go-to is an Excel document or Microsoft Project file that tracks page title, source URL, destination, page layout, notes and content author. Your own content migration document might have a few extra fields; either way, the key is to have a comprehensive outline of what is where and its final destination.

Content audit and rewrites

Now that you have a good grasp on all of the content you have and all of the content you want, its time to determine what needs to go on the chopping block; what can be reworked and updated for inclusion on the new site; and what needs to be written net new, making sure that anything scheduled for migration is of high quality and 100% ready to viewing. For each piece of legacy content, you must ask yourself (this is just a short example list, we're sure there are lots more):

- How long has it been on the site?
- When was the last time it got visitor traffic?
- Is it legally/organizationally required to be there?
- Would anyone miss it if it was gone?

Create Word document template for all content pages (For a sample layout, see Appendix A)

While this step may seem like a lot of extra work, it will make your life a whole lot easier in the end. For each and every page that will appear in the new site, create a word document titled with a corresponding page name (e.x. "1.0 HomePage.doc").

TIPS:

- Use brackets < and > to indicate page placement where images, alt tags, links and PDF documents should be inserted throughout
- Image placement instruction: you need to outline where you want the image placed within the page. For example, if you want an image aligned specifically to the right of a paragraph or below a paragraph, make a note in the corresponding word document for that page.

Create an images folder and optimize all of the contents

All images that will appear on the site should be migrated to this folder, once they have been optimized for web use, meaning: formatted to be the right size for the page and saved in the appropriate format for web display (jpg, gif or png file formats and optimized for web at 71 dpi).

Make separate folders for all other exterior site assets

Separate folders should be created for different file format types: PDF, Excel, SWF, Word, Vcards, video files etc. and all saved in their correct formats. These will be situated on the webpage in the word template step, and having them all in one place ready to go will save you time and effort.

Metadata, alt tag and keyword strategy for website search optimization (See Appendix B for keyword placement & Appendix C for alt tag strategy)

Today, a website is not complete unless it has been optimized for the search sphere. At this point in you new site/content migration, you must consider those implications and make decisions about what keywords visitors will be using to find your site. Your ideal goal at this step is ensure that all of your content is both searchable and sortable.

Decide between a manual migration, an automated migration or some hybrid of the two

It is often recommended that for sites under 1000 pages, you should manually migrate content to ensure as few errors and as little rework needs to be done post migration. An automated solution, usually accomplished through either a script or software, can make things easier in a lot of cases, but there is usually still some manual work to be done. The only way to be sure of yourself on this step is do lots of research or check with an expert (we know a few!)

Confirm content migration logistics

You're coming up to the finish line at this point; it's time to start setting up the particulars of the migration. Determine how many manual content migrators you will need, assigning them each specific content items, and ensure that all automated solutions are rolling and ready to go. At this point, you will want to do that aforementioned "content freeze" so that everything is set in stone (or as stone-like as a web project like this can be).

Migrate content

Wahoo! You did it.

Congratulations, you have successfully completed a content migration!

Appendix A

Page Content Word Document Sample

<Content for section 3.1 – About Us Page>

Note: Instructions are placed in brackets

About Us

Here is where you enter all of the text for the page. Here is where you enter all of the text for the page. Here is where you enter all of the text for the page. Here is where you enter all of the text for the page.

More Information

- Media Releases <link to section 4.0>
- Services <link to section 5.1>
- Visit our Corporate site <link in a new browser window to <http://www.sitename.ca>>

Note: Make sure you reference the section from the architecture diagram for internal page links.

Here is where you enter all of the text for the page. Here is where you enter all of the text for the page. Here is where you enter all of the text for the page. Here is where you enter all of the text for the page.

<INSERT image "picture_pretty.jpg"; Align to the right of the above paragraph text; ALT = "Pretty picture">

Note: Make sure you reference images to insert on the page in brackets including:

- File name
- Instruction on placement on the page.

Note on Website compatible Image file names:

Do not include spaces or "dashes" in file names. File names can include text, numbers and/or "_" (underscores).

Here is where you enter all of the text for the page. Here is where you enter all of the text for the page. Here is where you enter all of the text for the page. Here is where you enter all of the text for the page.

Read our PDF documents for further information:

- About Albert Einstein <Link this text to "about4_albert_einstein_brochure.pdf">
- About Newton <Link this text to "about4_newton_brochure.pdf">

Note: Make sure you reference PDF files you want inserted on the page in brackets with name of the PDF file and place the PDF file into the PDFs folder.

Note on Website Compatible PDF file names:

Do not include spaces or "dashes" in file names. File names can include text, numbers and/or "_" (underscores).

Appendix B

Page Content Word Document Sample with Keywords

<Content for section 5.2 – Case Studies>

Note: Instructions put into brackets

<Drop-down list here – please use the below main categories in this drop-down that will be anchor links to jump to this section on the page>

Business Solutions

Internet Mapping Helps Customers Find Stores

[American Suzuki Motors Corporation](#) [PDF 2.21 MB, 2 pgs] <Link to “cs_suzuki.pdf”>

[Category: Case Study | Keyword: Case Study Home Page]

[Category: Industry | Keyword: Business Solutions and Financial Services]

[Category: Product | Keyword: ArcEditor, ArcFM and ArcGIS 3D Analyst]

GIS Transforms Company's Way of Doing Business

[Apex Office Supply](#) [PDF 1.47 MB, 2 pgs] <Link to “cs_apex.pdf”>

[Category: Industry | Keyword: Business Solutions]

[Category: Product | Keyword: ArcFM and ArcGIS 3D Analyst]

Note: To keyword individual “blocks” of text – please list the category(s) and keyword(s) information highlighted in yellow underneath the content area to tag.

Note: Make sure you reference PDF files you want inserted on the page in brackets with name of the PDF file and place the PDF file into the “PDFs” folder.

Note on Website Compatible PDF file names:
Do not include spaces or “dashes” in file names. File names can include text, numbers and/or “_” (underscores).

Defense and Intelligence

Automated QA/QC Tests Aid in Map Production

[BAE Systems](#) [PDF 677 KB, 2 pgs] <Link to “cs_baesystems.pdf”>

[Category: Industry | Keyword: Business Solutions]

[Category: Product | Keyword: ArcFM and ArcGIS 3D Analyst]

Touch-Screen Mapping for Intel and Defense

[Northrop Grumman and Applied Minds](#) [PDF 321KB, 2 pgs]

<Link this text to “cs_northrop_grumman.pdf”>

[Category: Industry | Keyword: Business Solutions]

[Category: Product | Keyword: ArcFM and ArcGIS 3D Analyst]

Appendix C

ALT Tags

Definition

ALT tag stands for "Alternative Text". If you move your mouse on top of an image on a website you should see text appear that describes the image.

Why Use ALT Text?

Creating effective ALT text for images is a key element in creating a usable, high-accessibility Website.

Primary Audience for ALT text

- Sighted readers who browse non-graphically
- Blind and sighted readers alike who access a page using audio-based browser technologies
- Automated indexing programs that recognize and utilize [ALT](#) text as part of the page's contents >> such as google search.

ALT Techniques

- Keep it short - A few words.
- Keep it descriptive and meaningful - **Meaningless ALT text is probably worse than no ALT text at all.** ALT text that is meaningful in isolation helps guide readers to your page via automated indexers that read and understand ALT text.

Example ALT Text

For an image that depicts the members of England's Queen Elizabeth II and her family

- Good Alt text – "[England's Royal Family](#)"
- Meaningless Alt text – "[windsor.gif - 10.2 K](#)" – This is the file name and means nothing to someone who may not be able to view this image on the screen.