WebtreePro Implementation Guide

Contents

History of changes

Description	Author	Date
Document Creation	D.Beattie	06/26/2017

Purpose of this document

This document is a guide to be used in the implementation of Webtreepro sites. The audience of this document is the Implementation manager and associated members of the implementation team.

Pre-Sales

- Is there a need to integrate external systems
- Is there a need to create any custom features

Kick-off Meeting

- Schedule
- Create Powerpoint
- Determine Scope
- Specify team, share contact information
- Note Milestones/Timelines
- Ensure all parties familiar with next steps

Checklist

- Schedule status meetings
    - Timelines being met or need to adjust

    - Deliverables provided
    - Next steps clearly outlined

Understand the customers current site and environment.

- What is the current site url or new website?
- Is the site http: or https?
- Get current sitemap for the site
- Is there a previous Webtreepro site
    - Is there a need to clone the previous site (and enable email queue)
    - Will the new site be completely separate from the existing WTP site

Design

- Is the customer providing their own design or using PS designer?
- Can customer provide brand guide for color palette
- Can customer provide style guide
- Using Customer-provided design
    - Determine menu design and behaviors
        - Top level and sub-menus
        - Normal/Active/Rollover
    - Any special needs (fonts, slideshow theme, etc.)
- Using PS designer
    - Have customer provide URLs of websites they like
    - Have customer notate which specific colors/features they like
    - Define what general content/calls to action they want on home page
    - Have customer define any special interior layouts they might need
    - Provide design requirements to PS designer to create 2-4 home page and interior designs
    - Schedule meeting to review with client, pay special attention to likes
    - PS Designer to create additional mockups based on feedback
    - Review and finalize design with client

Skins and Templates

- All new skins and templates will be responsive
- Determine how many templates required—typically: home, interior/full width, special (right/left rail)
- Create Implementation PPT and submit to engineering
- Engineering provides templates on STG
- QA skin and templates, provide change requests and repeat QA
    - Test adding content including all styles
    - Test adding images and any needed features
    - Test responsiveness on mobile devices

- Test integration of any external systems (CMS, forms, Analytics)

Roles and Permissions

- Is there a need for child sites
- Will there be franchise/local website editors for child sites
- Determine which users will need to create their own pages/content or editing pushed content
- Determine if need for workflow approval
- Add any custom roles with specific permissions

Set up Users

- Add corporate
- Departments
- Regional
- Child site users (franchisees, store managers, stylists, etc)
- Test user accounts and specific roles/permissions

SEO

- Is there a need to match page URLs for existing site
- Add Meta information
- Add/recommend Analytics
- Image alt text

Mapping of pages

- Obtain a site map of the customers current site.
- Create page structure of site map for the new site.
- Create a mapping between old pages to new pages.

Page Title and Descriptions

- Home page and first level menu

Training

Clone site

- Test access to parent site

- Verify pages created on parent site, published
- Test access to child sites
- Verify pages pushed down to child sites, editable
- Test forms, data received
- Copy over images and files from WTP Library
- Run link report

Administration

- Create superadmin user
- Create initial content editor accounts (external and internal)
- Enable easy edit, other root features and page elements

Content Editing

- Provide text and images
- Group content
- Involve customers or support team
- QA in multiple browsers and on multiple device types

Site Cutover

- Schedule date and time frame
- Manage DNS
- Manage WTP root
- Ensure support personnel available (clone)
- Export reports (form submissions)

Post Launch Activities

- QA
- Schedule and conduct Client Initial Training and any follow-up trainings
- Schedule and conduct Support kickoff meeting
- Delete cloned site(s)
- Change password for clientname_adm account