

During your implementation process, you are learning all about Engage and as we get closer to the end of the training process we begin to really focus on the next step: migrating your data and launching! Launching Engage will look different from launching other products on campus, including OrgSync, since we will be bringing over the core data pieces from OrgSync to Engage. We have a team of developers who have worked diligently to build tools to migrate the information listed below. Please take a look at what will migrate below and ask your consultant if you have any follow-up questions.

### Basic User Information

- Username: jsmith123
- Email: jsmith123@state.edu
- First and Last Name with Middle Initial Jon D. Smith
- Hometown: Dallas
- ID Card for Card Swipe: 90087431
- Mobile number: 555-354-6813
- Carrier: AT&T
- Birthday: 07-16-95
- Home Address: 201 University Rd. Lexington, KY 75240 (Zip if less than 10) + COUNTRY

### Branch and organization information

- Long name: Student Government Association
- Short name: SGA
- Description: available as part of org registration on the first page. The description from OrgSync will become the welcome message on the org's page in Engage (will be truncated if lengthy).
- Org status: Current/Expired/Disabled
- Facebook, Twitter, YouTube links

### Primary Contacts

The logic our development team used to determine primary contacts is listed below. Since this is a new feature for OrgSync users, we had an opportunity to get creative!

- First, we looked at current position holders and chose the most recently approved position.
- If there were no position holders, we chose the newest administrator for the portal.
- If there were no administrators in the portal, we chose the newest member of the portal.
- Finally, when all else fails and there are no members in the portal, we will choose a community admin to be the primary contact.

### Organization Rosters/Current Memberships

When you move to Engage, all users will be members of the same portals that they were in OrgSync. Your students will not need to start from scratch on their member list.

*Pro tip: It would be a good idea to encourage students to update their member list under the People tool in OrgSync prior to migration to ensure an accurate roster upon migrating to Engage.*

### Past Memberships

These memberships will show up on the Co-Curricular Transcript for the student, as well as in any membership reports that you pull during the timeframe that the student was a member in the organization.

### Past and Future Events

- All event occurrences are brought over as individual events
- Event title, image, description, location, Total RSVPs Allowed, Visibility, Is Invite Only, organization hosting, status, all day, date, start and end times
- Event visibility

\*If there are any existing RSVPs for upcoming events, they will not come over. This could allow for new users to RSVP compared to what was there previously.

*Pro tip – Make a determination about all pending events before your migration date.*

### Event Attendance

- User attended
- User who swiped them in
- Event that the attendance belongs to
- Status (attended, partial)
- Event attendance creation date
- Event attendance could connect to either an account or an email

\*\* It is important to note that event hours will not be brought over and self-reported involvement (manually submitted involvement entries) is not brought over because those hours are not tied to a specific event occurrence in Engage.

*Pro tip- Complete an import to Engage to import any self-reported experiences from OrgSync. When looking at the "Involvement" resource in the Data Browser in OrgSync, you would add a condition to look at events where the event ID is blank. This will filter out anything where attendance was tracked.*

### Forms + Form Submissions

- Form submissions that with an approved, denied and pending status will migrate. Form submissions that have been re-opened will not migrate as they are not a complete submission.
- Form submissions with a deferred status will migrate to Engage as pending since deferred is not a status utilized in Engage.
- Forms with User Submitted Reviewers will migrate as text fields. This will not notify the individual, but the email will still be visible.
- Contact Information question types will migrate as multiple questions with the appropriate validation.
- Administrative Reviewers do not migrate. Reviewers will need to re-added to the forms after data migration.
- User submitted reviewers will migrate as text fields.

- Visibility Settings will migrate over using the following parameters:
  - Public = "Allow Anonymous Submissions From Public Users" checkbox enabled
  - Visible to all people in this community = Entire Campus
  - The Entire Portal = Visible to Entire Organization
  - Specific Groups = Visible to Entire Organization

*Pro tip – Once your forms have been migrated, you will want to double check the visibility settings.*

#### **Files/Documents**

- All files will come over and will respect the folder that a file belonged to in OrgSync.
- Only the current version of the file will migrate over. All past versions will not migrate.
- Visibility settings will not migrate over and will need to be updated post-migration.

#### **Photo Albums**

- Name of album
- Photos go into the appropriate album
- Photo album cover
- Visibility settings will not migrate over and will need to be updated post-migration