

Tech checklist for officer transitions

Things to be aware of, even if you don't think about them often

Overview for all offices

Introduction

Thank you to our outgoing and incoming officers for your willingness to serve. There are several online tools - from email to CALON - provided by the webministry to facilitate your duties. The first part of this checklist is meant to jog your memory to cover the broad strokes, regardless of your office. The second part lists some of the specific tools officers may need to use. In-depth explanations and tutorials can be found on the Webminister's page (<https://www.calontir.org/calontir-web-team/>). Please refer to Social Media Office resources regarding the use of your group's Facebook page or other social media.

Prior to office transition

- ___ Incoming officer should read the kingdom and society handbooks for the office
- ___ The incoming officer will ideally also refresh their knowledge of Corpora and Kingdom law
- ___ Incoming officer should fill out an Agreement to Serve, available on the Kingdom website
- ___ Outgoing officer should orient successor to the email account
- ___ Alert the incoming officer to any ongoing correspondence they may need to address
- ___ Discuss how you have used the office's Google Drive, and what resources you have stored there
- ___ Show your successor other office-specific tools, such as those in CALON and Google Workspace

Managing changeover

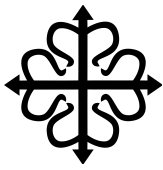
Updating Calon

Local seneschals and webministers are able to update officers in the CALON system for their local groups. Ideally, local officer changeovers will be handled at that level. Kingdom level officer and deputy changes can be handled at the kingdom level. Requests for officer changeover should come from kingdom-issued accounts rather than personal ones.

- ___ When ready, ask the appropriate team to change the officers in the CALON database.

Updating email address

Local webministers are able to reset passwords for their group, and should do so as soon as they update CALON. Account hand-offs involving webministers, kingdom-level officers, or groups without a webminister will



need to be handled by the Kingdom web team (support@calontir.org). The personal email address for the incoming officer is needed only for the purpose of password resets. The incoming officer will receive an email to their personal account prompting them to log in to their Calontir account within 48 hours.

___ Set a password and access email as the new officer.

After office transition

- ___ Check your kingdom-issued email regularly, at least weekly
- ___ Familiarize yourself with the web tools of the office
- ___ Questions should first be addressed to your predecessor or local webminister, if able.
- ___ Additional questions may be directed to the webministers' team at support@calontir.org
- ___ Keep up with updates to your office and web tools
- ___ Be proactive in finding and training your successor

Office-specific tools and permissions

Local officers

Seneschal

- ___ Within CALON: Use form to change over officers in their group
- ___ Within CALON: Initiate event bid, name event staff
- ___ Within CALON: Keep event form updated, this populates an event page on the website
- ___ Within Google Workspace: manage Groups for event staff
- ___ Within Google Workspace: update Announcements Google doc and calendar for local websites

Exchequer

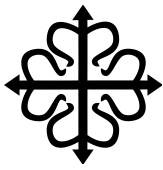
- ___ Within CALON: Inventory system, also accessible by group Quartermaster, if applicable
- ___ Within Google Workspace: use shared Exchequer folders as needed for reporting

Webminister

- ___ Access and update local website
- ___ Within CALON: Use form to changeover officers in their group
- ___ Within Google Workspace: initiate password resets for local officers
- ___ Within Google Workspace: manage Google groups for event stewards, feast stewards, etc.

Knight's Marshal

- ___ Within CALON: view authorized fighters local to their group
- ___ Within CALON: submit reports as group marshal
- ___ Within CALON: view reports submitted by marshals local to their group



Kingdom of Calontir
calontir.org

(Baronial) Herald

__ Within CALON: update Baronial OP

Quartermaster

__ Within CALON: Inventory system

Kingdom officers

All kingdom officers have the ability to update and edit Handbooks, policies, and other documents from within their Google Workspace. Some deputies' offices also have handbooks, and those deputies should have similar access to their own documents. Great Officers, and some deputies, are generally empowered to make posts within Wordpress to the News and Announcements section of the website, which also sends to the e-mail list.

Seneschal

__ Within CALON: update officers in the database for all roles and groups

Exchequer

__ Within CALON: update officers in the database for all roles and groups

__ Within Google Workspace: view financial report documents

Gold Falcon Herald

__ Within CALON: all powers available to their deputies

Chronicler

__ Within CALON: Add a link to event flyers in the event management system

__ Within CALON: View and update release form workflow

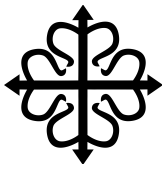
__ Within Google Workspace: store and edit event flyers

Kingdom Earl Marshal

__ Within CALON: view marshals reports

Kingdom webminister

__ Super administrator in all systems



Kingdom-level deputies

Armorial Clerk

- __ Create artwork for newly registered devices and badges
- __ Within CALON: Enter newly registered names, devices, badges, and aliases
- __ Within CALON: Enter names and other information for gentles newly relocated to the Kingdom

Card Marshal

- __ Within Google Workspace: receive and store authorization forms
- __ Within CALON: Create CALON accounts for newly authorized fighters
- __ Within CALON: Update authorizations

Epay deputy

- __ Within Google Workspace: create epay web form
- __ Within CALON: Add link to event form, with additional instructions if needed
- __ Within PayPal: send invoices

Precedence Clerk

- __ Within CALON: review, edit, and approve court reports submitted by White Hawk Herald
- __ Within CALON: create OP entries for populace members who moved from other kingdoms

Reeve

- __ Within CALON: Review and approve/decline event bids
- __ Within CALON: change “critical” event information, such as dates or sites
- __ Within Wordpress: Make announcements to the Kingdom website

RUSH staff

- __ Within CALON: Enter or approve A&S classes
- __ Within CALON: Record class attendance
- __ Within CALON: Identify degree recipients

White Hawk Herald

- __ Within CALON: Enter court reports