

## CivicClerk 8 Migration Checklist

- Attend migration webinar
- Schedule migration call
  - Bring a list of preferred migration dates (Schedule between meetings **after** the agenda for an upcoming meeting has been completed and posted)

### **At Least Two Weeks Before Scheduled Migration:**

- Review migration training materials
  - Administrator training
  - Staff training
  - CivicPlus Media training (if applicable)
- Respond to the migration confirmation email
- Add any additional optional services (if desired):
  - CivicPlus Media
  - Custom IdP Integration
  - Boards and Committees Module
  - Minutes and Live Meeting Manager
  - Additional training

### **At Least One Week Before Scheduled Migration:**

- User list management
  - Disable inactive users
  - Ensure **all** users have a valid email address that they can access to set their passwords
- Begin custom IdP integration (ADFS) work with CivicPlus (if applicable)
  - Supported custom IdP integrations - ADFS 3.0, ADFS 4.0, Azure AD, and Okta

- Internal communication to all users
  - Confirmed migration date and time
  - Provide access to recorded training materials
  - Preferred browser (Chrome, Firefox, Edge)
  - CivicPlus Platform password setting instructions
  - After migration, there will be a new URL to access
  - Provide a link to the CivicClerk 8 Help Center

Several days before your migration, CivicClerk will reach out to confirm readiness to proceed.

## **Day of Migration:**

- CivicClerk will confirm migration has been completed
- CivicClerk provides a new URL for administrator access

## **After Migration**

- Test stream with CivicPlus Media (if applicable)