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| Upgrade to iMIS EMS | | |
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| Checklist and Approval | | |

This checklist and approval form serves as a helpful resource to ensure that all parties included in the upgrade process to iMIS EMS are aware of necessary steps and actions required for success.

*The Partner: Enter Partner or ASI Client Success Name*

*The Client: Enter Client Organization Name*

# Getting Started

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|  | 1. We, the Partner, have upgraded the client to iMIS 2017GA with the latest service pack. |
|  | 1. We, the Partner, have removed all customizations and have reconfigured the client’s site to work in a cloud friendly manner in accordance with ASI guidelines and recommendations. |
|  | 1. We, the Partner, have shared the iMIS test environment with the client. |
|  | 1. We, the Partner, have shared the Test Plan with the client. <https://help.imis.com/enterprise/upgrading_to_imis_ems/testing_imis_ems/testing_imis_ems.htm> |

# Committing to a Successful Upgrade

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|  | 1. We, the Partner, confirm that all reconfiguration and dropped customizations do not negatively affect the iMIS test environment and the site is working as expected. |
|  | 1. We, the Client, confirm that the test plan has been followed and testing has been completed on the iMIS test environment in accordance with our own business processes and requirements. |
|  | 1. We, the Client, have filled out the application form to setup our iMIS Pay Gateway. |

# Sustaining Client Success in iMIS

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|  | 1. We, the Partner, have coordinated an upgrade date and have requested the upgrade to take place on (enter date). |
|  | 1. We, the Partner, will commit to supporting the client for a minimum of two weeks post upgrade. |
|  | 1. We, the Partner, will notify Rob Druhot ([rdruhot@advsol.com](mailto:rdruhot@advsol.com)) and Kristina Drosos ([kdrosos@advsol.com](mailto:kdrosos@advsol.com)) when the client is being officially transitioned to Tech Support post upgrade for ongoing iMIS support. |

I am representing the Partner and the Client by signing the below and confirming that the above steps have been taken.

I also understand that I am required to submit this completed document to Cloud Services through the Support Portal via a Support Ticket [https://support.imis.com/](https://support.imis.com/hc/en-us) prior to the upgrade date in order to proceed on the date selected. Upon receipt by Cloud Services, the upgrade date will be confirmed.

Signing Authority

Title:

Organization:

Date: