

# Migration Survey

This document is used to gather information to ensure a successful migration. Please answer the questions and return to your Project Manager's secure mail drop. Please inquire with your Project Manager if their secure mail drop address has not been shared with you. Delays in completing this survey impact the Project Timeline.

Target Live Date

## Financial Institution Information

FI Name

FI Address

Hours of Operation

Time Zone

Eastern

Central

Mountain

Pacific

Hawaii-Aleutian

## Technical Lead

This is the primary contact for all IT related questions and tasks.

Name:

Title:

Phone:

Mobile:

Email:

## 3<sup>rd</sup> Party IT Vendor

This is the primary contact regarding your technical needs for both implementation and ongoing support. This person is responsible for implementation of the pre-built OVA server image, ensure the check printers are installed on the eChecks server and ongoing support. This party is required to sign a three-way MNDAs.

Name:

Title:

Phone:

Mobile:

Email:

# Migration Survey

## Environment

Business Applications	Name	Version	Business Location
Core System	_____		
Imaging System	_____		

## Server

Server Environment	VMWare	Hyper-V	Other
Virtual Environment	In-House	Hosted	Hosted by
Anti-Virus Software	_____		

## eChecks Setting Manager

**Additional Server License for eChecks?**  
\_\_\_\_\_

**Total Check Queues**  
For the check queues, the IMM installer will create the first 3 thereafter; the CU is responsible for the remaining check queues.  
\_\_\_\_\_

**How many different check types?**  
Please ensure all the various check types are tested, printed and ingested into your imaging system during the Customer Acceptance Testing "CAT" phase.  
\_\_\_\_\_

**Number of Branches?**  
Please determine before your Target Go Livedate whether you are rolling out one branch at a time or the entire credit union wide.  
\_\_\_\_\_

**Who is your Clearinghouse?**  
\_\_\_\_\_

## Printers

Please list ALL printer/models that will be used for eChecks.  
Note: if all printers have the same model only list one printer.

Number of Check Printers	_____
Printer Types	_____